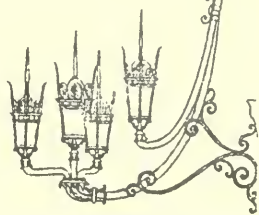


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COLUMBIA POINT PENINSULA

REQUEST FOR DEVELOPER PROPOSALS

BOSTON PUBLIC WORKS



BOSTON REDEVELOPMENT AUTHORITY BOSTON HOUSING AUTHORITY

COLUMBIA POINT COMMUNITY TASK FORCE, INC.

PROPOSED SCHEDULE FOR COLUMBIA POINT DEVELOPER SELECTION PROCESS

BOSTON PUBLIC LIBRARY

BRA internal review and analysis

November 1-15

BRA, BHA, Task Force meeting
to discuss submissions
Preparation of questions for
developers

Wednesday, November 17
10:00 a.m.

Developers' presentations to
BRA, BHA, Task Force

Monday, November 22
10:30 a.m. - 12:30 p.m.
Tuesday, November 23
9:30 - 11:30 a.m., 12:00 - 2:00 p.m.

Presentation to HUD

November 23 - 30

Notice to proceed with preparation
of full development proposals
to finalists
Modified submissions requirements
completed

Wednesday, December 1

Series of presentation²
tours, etc. for developers
Written and graphic material
gathered for developers

Wednesday, December 8
Thursday, December 9
Friday, December 10

Regular weekly meetings with each
developer

Wednesday, December 15
22
29
January 5
12
19
26
Monday, January 31

Second stage submissions by developers

M. Grull

gov. 96-440

Property Unit
BOSTON REDEVELOPMENT AUTHORITY
Library

BOSTON PUBLIC LIBRARY

COLUMBIA POINT PENINSULA
REQUEST FOR DEVELOPER PROPOSALS

CITY OF BOSTON
KEVIN H. WHITE, MAYOR

BOSTON HOUSING AUTHORITY
BOSTON REDEVELOPMENT AUTHORITY
IN PARTNERSHIP WITH
COLUMBIA POINT COMMUNITY TASK FORCE, INC.

September 12, 1982

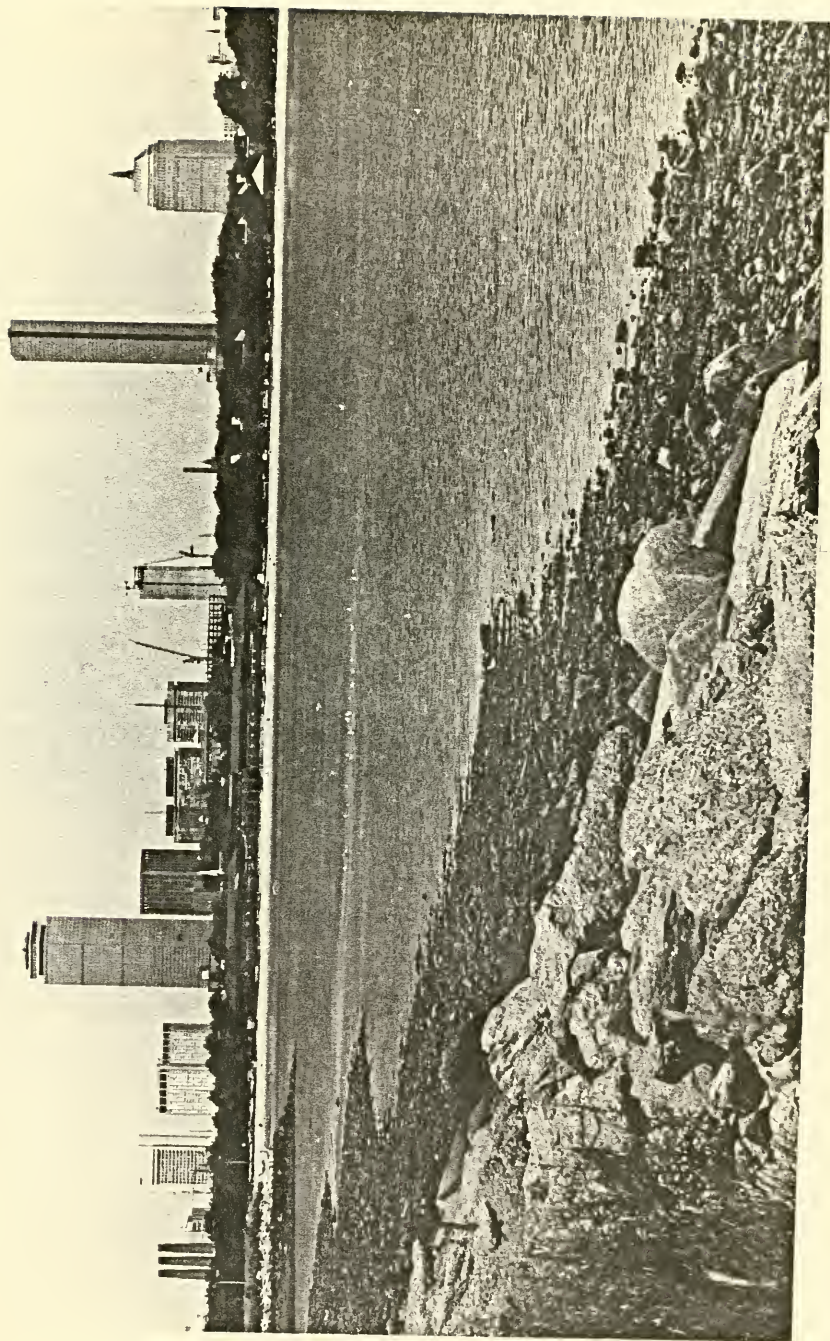


ILLUSTRATION 1.

VIEW FROM COLUMBIA POINT
TO BACK BAY

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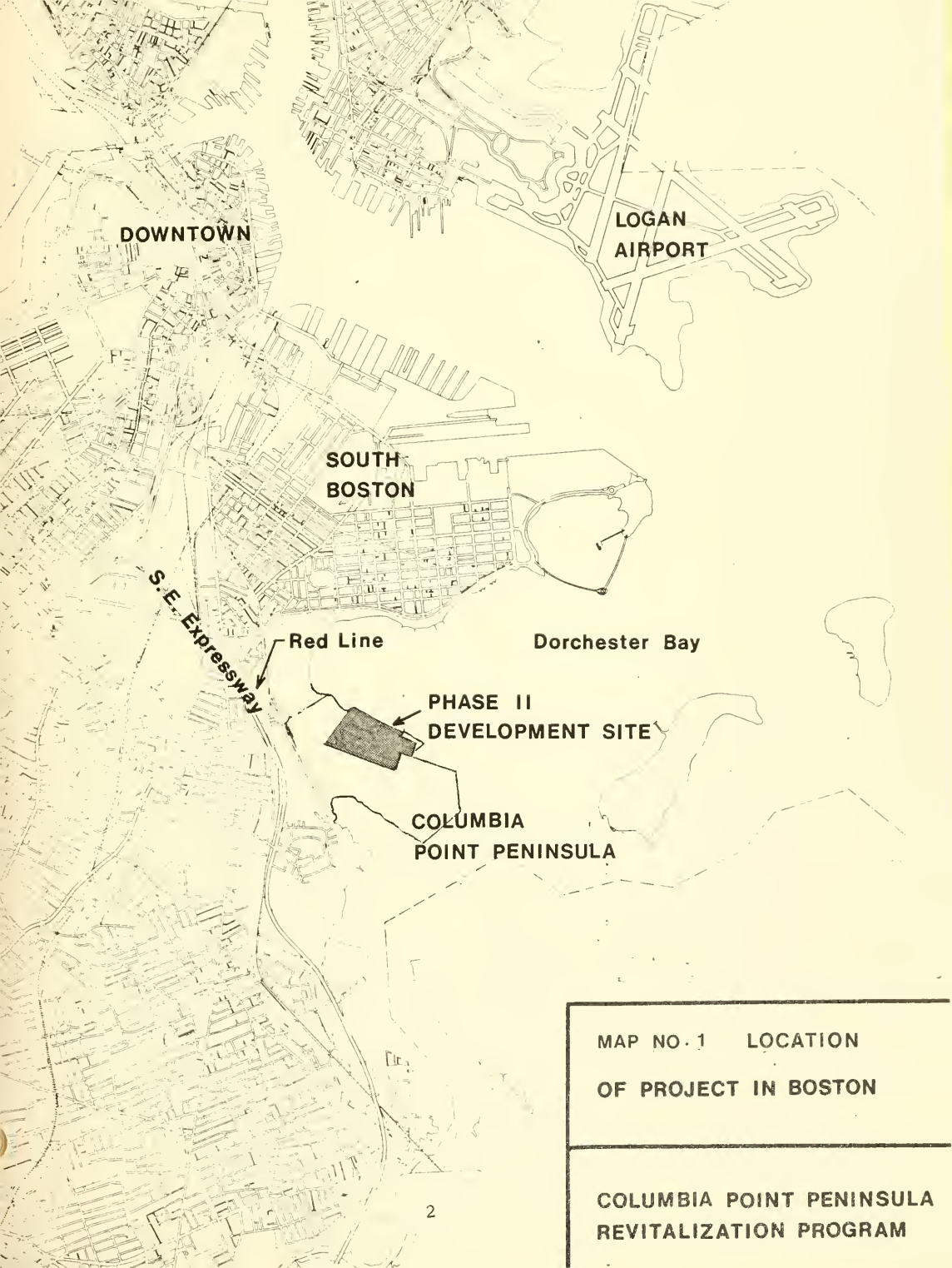
I. INTRODUCTION

The Columbia Point project presents an unusually exciting and large-scaled development opportunity: to create a new Boston neighborhood, consisting of a mixed-income residential community closely integrated with the already strong and growing institutional and commercial activities. The site for this new neighborhood is a peninsula just south of downtown Boston on a major highway with dramatic views of that area and Boston Harbor (See Map 1).

This Request for Developer Proposals offers the first residential parcel in the Columbia Point Peninsula Revitalization Program, a program which has been created jointly by the Boston Redevelopment Authority (BRA), Boston Housing Authority (BHA) and the Columbia Point Community Task Force, Inc. (Task Force). The overall program calls for the development of a new, mixed-income, racially integrated residential community with appropriate support facilities and the redevelopment of the Bayside Mall as a major exhibition center.

The development team selected for this phase would be responsible for the development and management of up to 1,600 units of new and renovated housing units for low, moderate and higher-income tenants and/or owners. The approximately 50-acre residential parcel being offered for development is owned in part by the BHA, and in part, by the City of Boston. The BHA land is the site of the Columbia Point public housing project. The City land is developed, in part, as a recreation area.

The selection process for the private developer of this parcel will be a competitive one, conducted by the BRA, BHA, and Task Force. It will be in two stages, the first a request for qualifications from all interested developers, after which the field will be narrowed to three to five finalists, and the second, a request to these finalists for full development proposals. The parties' schedule calls for the selection process to be completed by March 18, 1983. The conclusion of the process will be the tentative designation of the preferred developer by the BRA and BHA.



MAP NO. 1 LOCATION
OF PROJECT IN BOSTON

COLUMBIA POINT PENINSULA
REVITALIZATION PROGRAM

II. PENINSULA REVITALIZATION PROGRAM

A. Columbia Point Peninsula

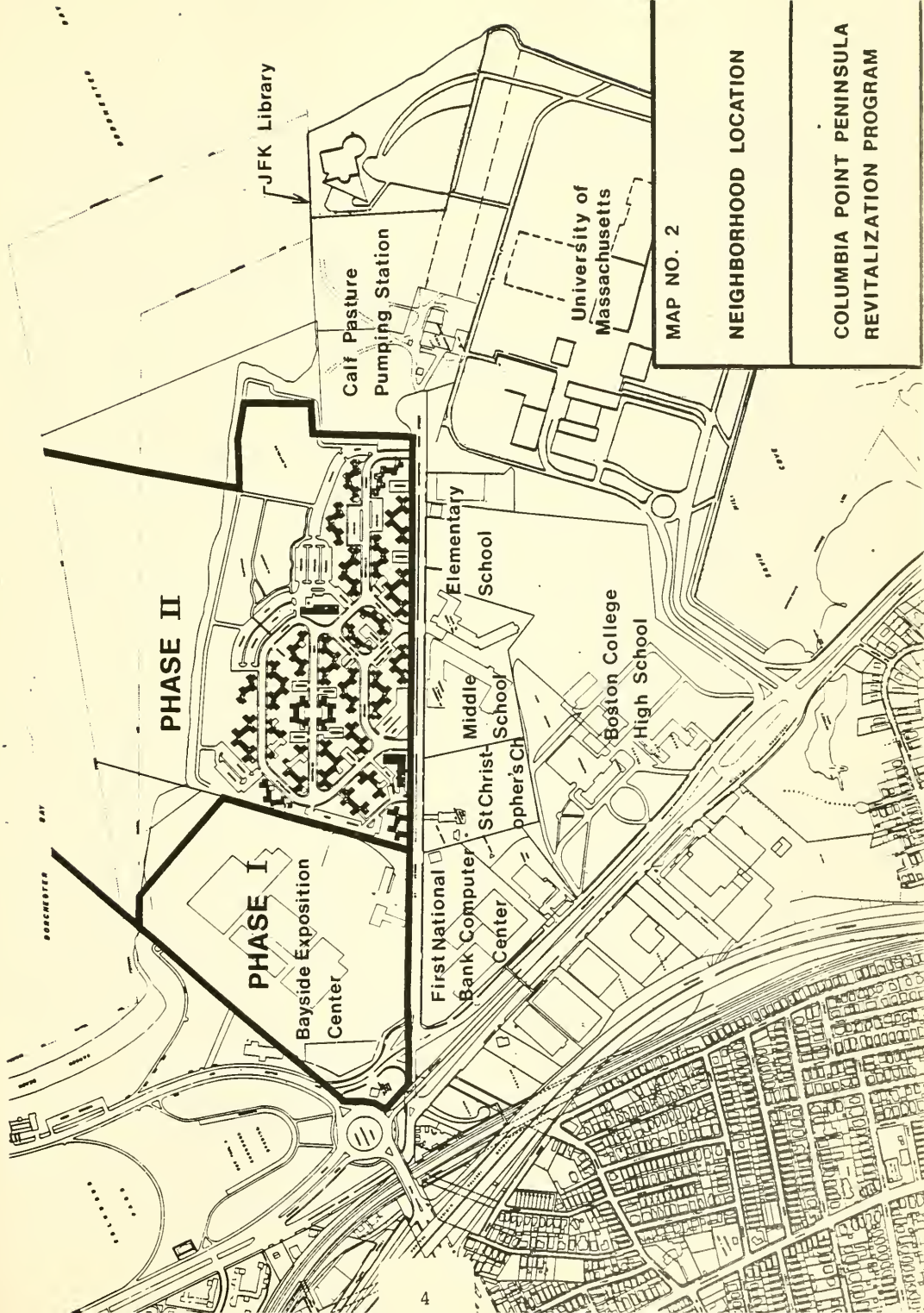
The location, accessibility, amenities and natural beauty of the Peninsula render it one of the most desirable sites for new development in the City of Boston. Situated only three miles from downtown, Columbia Point is merely a five minute drive via the Southeast Expressway or a ten minute subway ride on the Red Line from the City's center, and plans are underway for water taxi connections between downtown and Columbia Point. The 351-acre peninsula provides two miles of continuous shoreline primarily in public ownership, as well as spectacular views of the Back Bay and financial district skylines, the Harbor Islands and Dorchester Bay (see Map 2).

Several prestigious institutions have moved to the Peninsula in recent years, a testimonial to its tremendous potential for revitalization. The Kennedy family selected 9.5 waterfront acres of the Peninsula to house the John F. Kennedy Presidential Library. This dramatic building, designed by I.M. Pei, was dedicated and opened in October 1979, and welcomes approximately 700,000 visitors annually.

The University of Massachusetts-Harbor Campus is similarly located at the southeastern end of the Columbia Point Peninsula. Completed structures cover sixty of the 103 acres under University ownership, and include 1.6 million square feet of building space and 1,600 parking spaces, representing an investment of \$160 million. The University's future plans include the construction of a third college and an Arts & Science Building. In addition, the Commonwealth of Massachusetts will start construction in Fall 1982 on its State Archives building between the Kennedy Library and UMass campus. The headquarters and printing plant of the Boston Globe and the computer operations center of the First National Bank, along with several other major businesses and institutions, are also located on the Peninsula.

The most positive recent development at Columbia Point is that plans are currently underway to revitalize the existing, nearly vacant Bayside Mall into the largest trade center in New England. The development of the Bayside Exposition Center, which will accommodate both trade and gate shows and permanent display and office space for the garment industry, will serve as a catalyst for the redevelopment of the entire Peninsula.

Despite these considerable assets, the redevelopment of Columbia Point will present a very real challenge to the selected developer and other involved parties. The most critical obstacle relates to the Columbia Point public housing project, the largest in New England. Of the 1,504 units built in 1954, approximately 400 are now occupied, and the vacant units have been seriously vandalized. The project as built was far too intensively developed and despite the vacancy rate, remains oppressive in its density and its derelict condition.



Despite Columbia Point's being surrounded on three sides by water, the design and construction of the public housing project hardly recognizes this relationship, and it is difficult to walk or drive to the water's edge. In fact, attractive and inviting public access to the shoreline at Columbia Point is virtually unavailable.

Further the natural geographic isolation of the Peninsula from the larger community is intensified by the indirect and not particularly attractive access to Mt. Vernon Street which serves as the housing project's only vehicular connection to the rest of the City.

B. Overall Peninsula Revitalization Program

The comprehensive program for Columbia Point will be carried out in three major phases. Upon completion it is intended to result in a mixed-income residential community for 6,000 to 8,000 residents, with supporting recreation, service and commercial facilities, and a major new exhibition center. This will occur largely on the one hundred plus acre development site north of Mt. Vernon Street owned now by several public and private entities. Through the creation of this new Boston neighborhood, the Peninsula and its residents will become an important ingredient in the life and activity for which the City is known. Columbia Point's long history of isolation, resulting from the various populations and purposes it has served, will be overcome by Peninsula-wide redevelopment for a broad-based constituency.

The Peninsula Revitalization Program includes the following elements:

- o a renovated Bayside Mall into a new multi-use exhibition facility;
- o 2,000 - 2,500 units of new and renovated mixed-income, racially integrated housing;
- o neighborhood shopping convenient to the residential area;
- o a new waterfront park and beach and other recreational and open space facilities;
- o public improvements to utilities and traffic and pedestrian circulation systems; and
- o a renovated Calf Pasture Pumping Station with restaurant/retail, community and visitor center functions.

Before describing in detail the offering being made in this Request for Developer Proposals (Phase II) - the following sections will deal with Phases I and III.

1. Phase I - Bayside Exposition Center

a. Overview

The first phase will be the conversion of the almost vacant Bayside Mall, owned by John Hancock Insurance Company, into the Bayside Exposition Center by Bayside Associates, a joint venture of Corcoran, Mullins, Jennison, Inc., and O'Connell Brothers Construction Company, Inc. This would be New England's largest facility for trade and gate shows and would include permanent showrooms for the women's garment

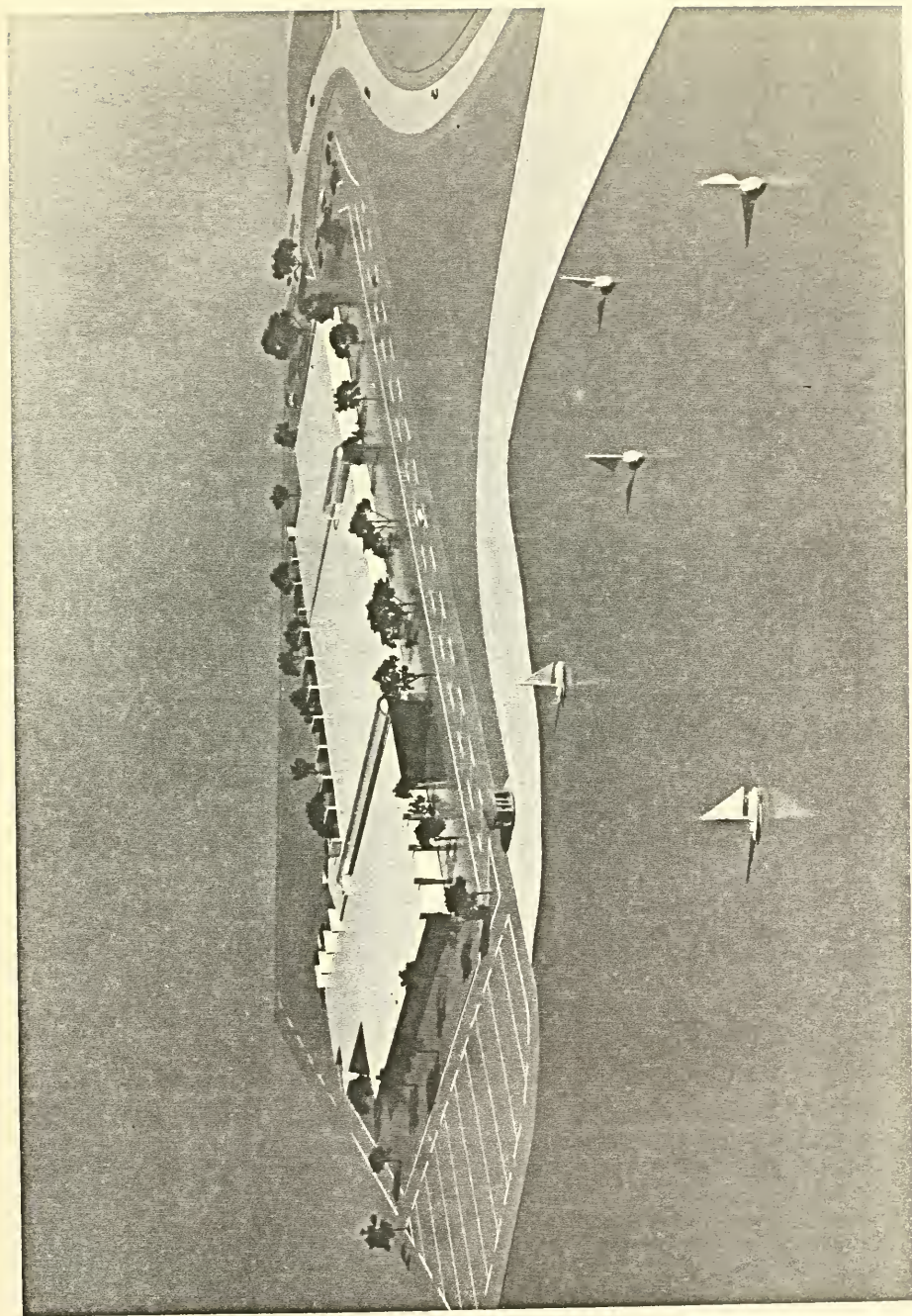


ILLUSTRATION 2.
MODEL OF BAYSIDE
EXPOSITION CENTER

industry as well. Bayside Exposition Center will represent a major investment in the Peninsula, generating considerable economic activity in terms of construction and permanent jobs, increased taxes, etc., from presently vacant buildings. Perhaps as important, Bayside will attract large numbers of visitors (for instance 30,000 per day for the New England Flower Show), thereby reducing Columbia Point's sense of isolation and the public perception of its being an unsafe place.

Improvements to the property will include the rehabilitation of the building shells and changes to the exterior of the buildings to emphasize their new uses. This will include extensive reconstruction of the entrances to make them appropriate for their new uses. The building interiors will be converted to suit their functions as showrooms, and exhibition spaces between the exhibition buildings will be covered and converted to interior corridors that can be used by vendors, food services, etc. The parking area will be rehabilitated as needed, extensively landscaped and lighted, and re-oriented to serve the property's new functions.

This project will represent a total investment of more than \$17 million, including \$13 million in private investment and \$2.25 million in UDAG funds requested to complete the permanent financing. As soon as notification is made of the anticipated UDAG award on September 30, 1982, Bayside Associates intends to start full rehabilitation of the buildings and parking lot and to open the facility for the first gate show January 2, 1983 and for the garment industry in March. The Boston Teachers' Union, which rents one of the buildings, will continue to be located in that space.

As part of its UDAG application, filed July 30, 1982, the City has also requested a grant of \$2.1 million to provide public improvements critical to the success of not only the Bayside Exposition Center, but the Phase II residential community as well. These public improvements will include new vehicular entrances into Columbia Point both from the north from Day Boulevard to Mt. Vernon Street and from the south from the UMass loop road to Mt. Vernon Street. The BRA acting as agent for the City would be responsible for the engineering, design and construction of these improvements.

b. Site Information

The Bayside Mall property encompasses 26 acres at the neck of Columbia Point with its entrance at the intersection of William Day Boulevard and Mt. Vernon Street. The mall itself includes four adjacent but free standing buildings which were originally built for retail stores. These single level buildings cover 280,000 square feet with the remainder of the site given over to paved parking.

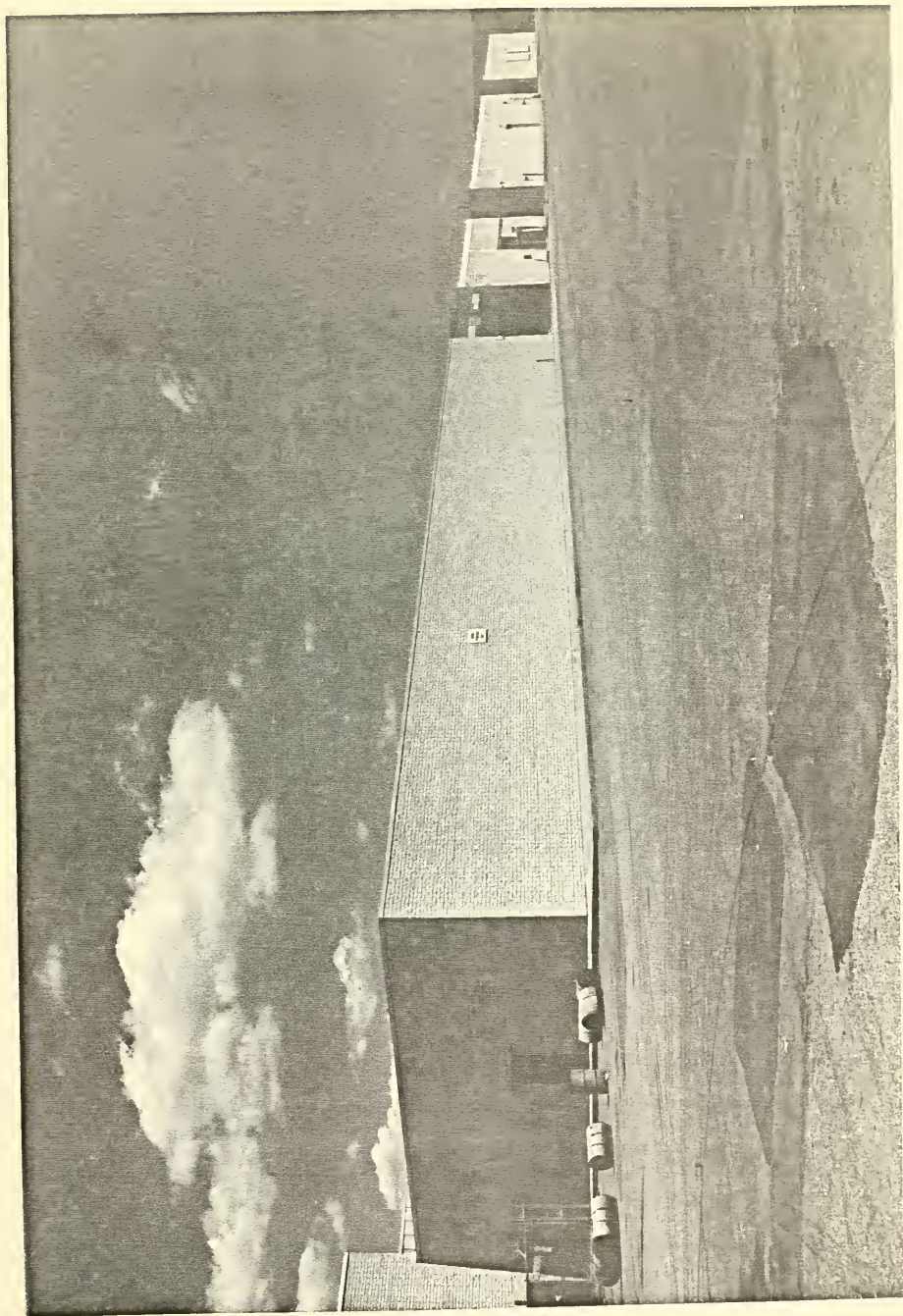


ILLUSTRATION 3.
BAYSIDE MALL BUILDINGS

2. Phase I - Uphams Corporation Parcels

Adjacent to the Phase II residential parcel are two parcels currently owned by the Uphams Corporation on which Bayside Associates (Phase I Exposition Center developers) has options to purchase. As both parcels are critical to the plans for a peninsula-wide revitalization effort, Bayside Associates has entered into an agreement with the BRA to ensure that development of the two sites conforms to the City's redevelopment plans.

This agreement establishes that the developer will convey to the Boston Redevelopment Authority a thirty-foot recreational easement on the waterfront parcel of about 3 acres which will continue the public waterfront use from the adjoining Metropolitan District Commission beach to the future waterfront recreational development on the Boston Housing Authority and City of Boston properties. The balance of the site, after the provision of approved landscaping, may be utilized for parking in support of the Bayside Exposition Center. If redeveloped in the future for other than parking use, the site must maintain a residential character.

The agreement also establishes that in a second phase the other parcel on Mt. Vernon Street will be developed for neighborhood commercial uses in conjunction with the housing development of Phase II. The developer will undertake to carry out a development program approved by the BRA in conjunction with the start of Phase II construction of at least 1,200 units. The plan calls for a minimum of 20,000 square feet of neighborhood commercial uses, including a food store and other retail outlets, and an additional minimum of 10,000 square feet for restaurants. If the developer should fail to meet this commitment, the BRA has the right to advertise for and select another developer for this parcel.

The success of the housing developed in Phase II is closely linked to the progress of the Bayside Exposition Center and to its developers' intentions to provide retail services between Bayside and the housing site. Bayside's redevelopment - creating a vital community element out of a vacant shopping center and bus parking lot, providing construction and permanent jobs for area residents, ending the peninsula's isolation and improving its image, dramatically upgrading the entrance to Mt. Vernon Street - presents critical assistance to the developer of the Phase II housing.

3. Phase III - Completion of Peninsula Revitalization Program

Following the completion of Phases I and II, the comprehensive revitalization program proposes in Phase III the further development of residential units (up to 900 units), additional commercial space (in the renovated Calf Pasture Pumping Station) and water-related recreational facilities (a marina and major waterfront park).

The proposed Phase III redevelopment site includes the Boston Water and Sewer Commission's 9.5 acres of land at the eastern end of Mt. Vernon Street. Current plans call for the renovation of the

Calf Pasture Pumping Station there to house a restaurant, retail facilities and a community and visitors' center, as well as development of the balance of the site for residential use.

In addition, the University of Massachusetts owns two vacant parcels equalling approximately 13 acres at the eastern portion of the peninsula. The development of this site in a manner compatible with the rest of the peninsula will be pursued by the City with the University.

C. Urban Renewal Plan

It is contemplated by the parties that an Urban Renewal Plan will be put in place covering the entire Peninsula Revitalization Program area. It will be the function of this Plan to formally establish objectives and controls over the redevelopment area. In this fashion development compatible with the present Phase II redevelopment will be assured.

The plan would be instituted after tentative designation of the developer of Phase II. The Phase II development proposal approved as part of this designation would be incorporated into the Urban Renewal Plan and the objectives and controls for other properties would reflect the selected proposal.

III. PRESENT OFFERING - PHASE II RESIDENTIAL DEVELOPMENT

This section describes the site being offered by this kit, what the proposed program is and what the developer is expected to do.

A. Phase II Overview

Phase II of the Columbia Point project will be the development of up to 1,600 units of mixed-income housing on a 50-acre site adjacent to the Phase I Bayside Exposition Center. This phase will take place on land which is owned by the Boston Housing Authority and the City of Boston so the land can be made available in a timely fashion to a private developer.

Of the 1,600 units in this phase, 400 units will be low-income housing. The balance of the project is to contain 400 units of moderate-income housing and up to 800 units of market-rate housing with necessary supporting retail, recreational and community facilities.

I. Site Information

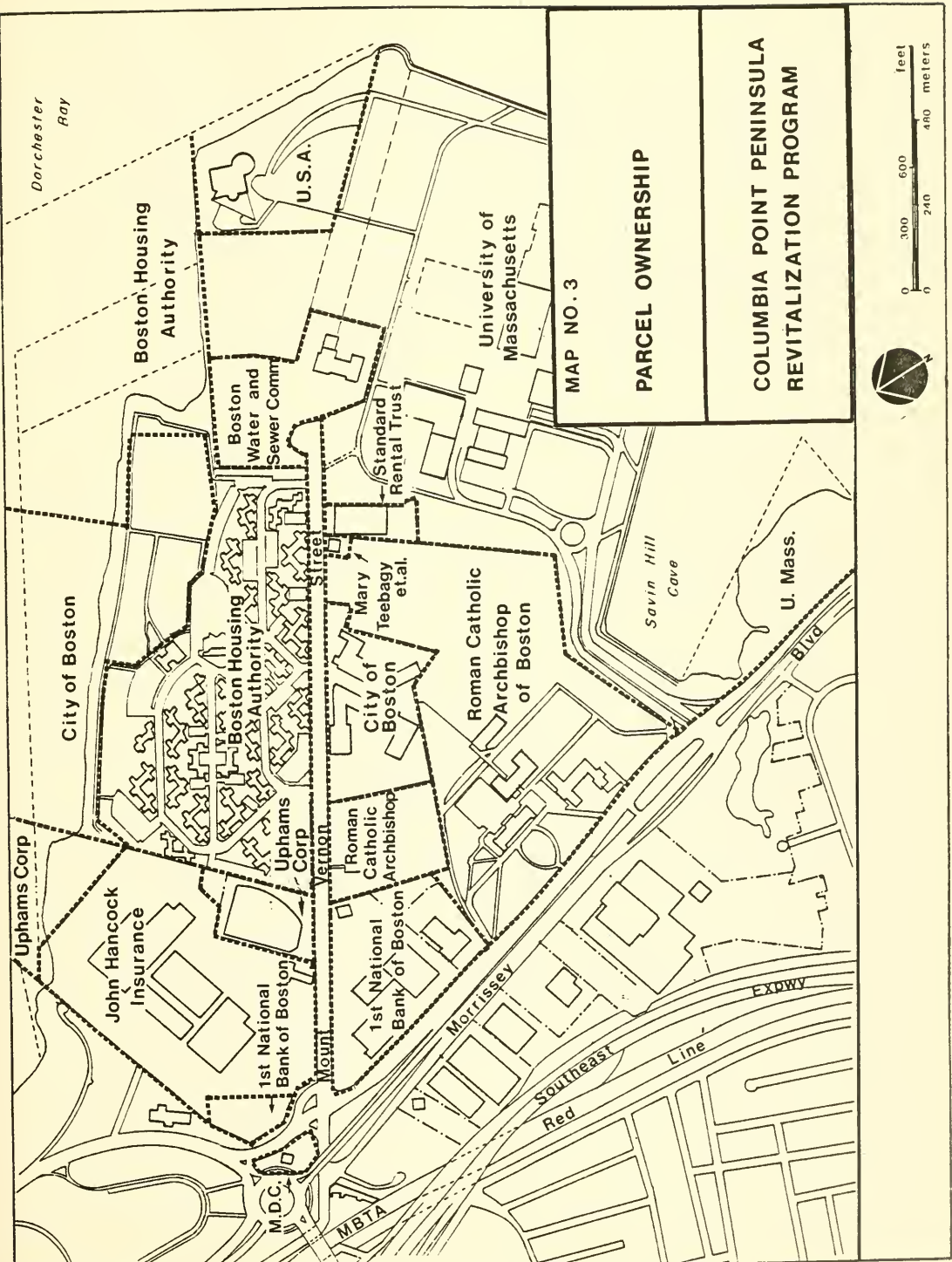
The Phase II development site which consists of two parcels encompassing approximately 50 acres is presently owned by the Boston Housing Authority and the City of Boston Public Facilities Department (see Map 3).

The BHA parcel of 37.7 uplands acres is the site of the Columbia Point housing project which consists of three 1-story, non-residential buildings and 1,504 housing units in 15 seven-story and 12 three-story buildings. However, only 25% of the existing units are currently occupied. Nine of the seven-story buildings and one three-story building are completely vacant and boarded and three others are partially boarded. The fourteen remaining residential buildings are occupied by approximately 1,500 people (360 families and 40 elderly or handicapped residents). An additional seventy-five apartments are occupied by 12 social service agencies.

The low-rise buildings are generally located along Mt. Vernon Street and the westerly portion of the site. The mid-rise buildings form a dense central core and continue to the easterly edge. The low-rise buildings and central mid-rise buildings, if occupied, house predominantly families. The mid-rise buildings on the eastern end of the development, Buildings #26 and #27, are partially occupied by the 40 elderly or handicapped residents (see Appendix A - Building Number Plan).

The buildings are all of reinforced concrete frame with masonry walls and brick exterior. They are linked by a city street system and are served by twenty-three at-grade parking areas with a total of 1,150 spaces.

An administrative building located on Mt. Vernon Street, containing office space, an assembly hall and a day-care center is one of the three non-residential project structures. The other two buildings



are a City of Boston Parks Department recreation building located on the eastern edge of the site abutting the city-owned park, and a nearby steam-heat oil-fired generation plant with four boilers that were renovated in 1978. All buildings on the site, except the recreation building, are served by the central heating plant via four underground loops. The distribution lines need substantial repair.

The City of Boston parcel of 13.5 uplands acres is presently the site of a waterfront park serving the housing development. Tennis and basketball courts, baseball fields and a tot-lot were developed for the residents on the western portion, but are not in good condition due to poor maintenance. The eastern portion of this parcel is essentially vacant.

2. Phase II Site Ownership

The public housing site is owned by the Boston Housing Authority and, with the exception of the recreation building, which is owned by the City of Boston Parks Department, all of the buildings are owned by the BHA. BHA is prepared to request concurrence of HUD in the sale or lease of all or any portion of its site and buildings to the developer, and to request permission for the demolition of portions of the project. HUD has indicated a willingness to concur both in the disposition of the project and its partial demolition, if these are necessary to achieve a viable development plan for Columbia Point.

The City of Boston parcel was formerly owned by the BHA and was deeded to the City of Boston's Public Facilities Department in 1970 so that the City could construct active recreation facilities. The deed provides that the BHA shall have a right to repossess the land if it is taken out of recreational and playground purposes. More important for purposes of determining the future use of this land, Article 97 of the Massachusetts Constitution would require a 2/3 vote of the state legislature if the land were to be taken out of recreational use because it was deeded to a public agency for such use. The difficulty of obtaining such a vote, however, would be minimized if an equivalent area of land elsewhere on the peninsula were provided.

The recreation facilities were constructed in 1973 and 1974 using Federal Bureau of Outdoor Recreation and City funds. If these facilities were to be removed and the land used for something other than recreation, the use would need to be approved by the U.S. Secretary of the Interior and equivalent substitute recreation facilities provided elsewhere.

B. Phase II Program Description and Developer's Responsibilities

The Phase II program consists of the following elements:

1. Residential Development

The developer will be expected to propose a mix of housing units which serves low income (public housing eligible), moderate-income (100% of SMSA Median Income), and upper-income (market rate) households. At least 400 low-income units, to be available at rents not greater than those paid by public housing tenants, must be provided and permanently maintained as a part of the redevelopment effort. If the developer obtains a commitment for low-income rent subsidy and that commitment expires during the life of the residential development, the developer (or other owner at that time) must demonstrate how he would propose to continue to provide 400 low-income housing units.

In carrying out this commitment to provide the low-income units, the developer will be required to meet the terms of the Columbia Point Resident Rehousing Agreement (see Appendix A for full text), which guarantees a new or renovated unit for the present Columbia Point public housing tenants. This agreement was entered into by the BHA, the BRA, and the Columbia Point Community Task Force, Inc., on April 8, 1981, and was formally endorsed by HUD on September 3, 1982. There are about 360 families and 40 elderly households which have signed this agreement and indicated their intention to live in the new community.*

It is the goal of the three parties that the current public housing tenants who are beneficiaries of the Rehousing Agreement will be accommodated in new or renovated housing units as soon as possible, and if applicable, in only one move. The developer will be expected to assist the BHA in implementing temporary relocation of current tenants, and (to the extent that other public funds are not available for this purpose) to pay relocation costs for moving the present tenants.

The parties' goal is also that the developer provide 400 units of moderate-income housing as an important element of this mixed-income community and the developer will be expected to expend his best efforts to provide these. The balance of the units, 400 to 800, will be market-rate.

* The following are the bedroom sizes needed to accommodate the present families if current BHA Tenant Selection and Assignment plan guidelines are applied. They provide that children of different sex over the age of 6 are not expected to share bedrooms, but two children of the same sex are expected to share a bedroom. One BR, 5%; 2BR, 35%; 3BR, 33%; 4BR, 18%; 5BR, 7%; 6BR, 2%. The 40 elderly households require predominantly one, but also some two BR units.

Due to the high density of certain areas of the present BHA public housing project, it has been assumed for some time that the developer will propose the demolition of some of the buildings as well as a reduction in height of others. Those remaining buildings will be extensively rehabilitated, both on the interior and the exterior, with the newly-constructed dwelling units being considerably larger than the present ones. Whatever new construction occurs should be primarily of a townhouse type and must be compatible with the existing walk-up buildings.

The intention of the parties is that the new housing community have a family-oriented character and that there be, as far as possible, a mixing of incomes and races throughout the development.

2. Management

At the time of final designation, and subject to adequate funding, the private developer will be expected to enter into a contract with the BHA to assume interim management of the Columbia Point Housing Project. It is the three parties' intention that private management improve the operation of this troubled project and upgrade the quality of life for the present tenants.

In addition, the private developer will be required to manage all the housing units in Phase II upon their completion and occupancy.

The developer must manage the project so as to maintain a sense of community among the residents. It is expected that management proposals will provide for strong participation by residents in development decision making as well as its operation after completion. This will include involving the Task Force, the elected body representing the existing tenants, in a partnership arrangement, providing a mechanism for insuring some residential control in management operations and providing financing of the residents' organization to assure its continued involvement in decision making at all stages. As part of its undertaking with the developer, the Task Force will create a plan providing for the representation of new Columbia Point residents as the development becomes occupied.

3. Site Planning - Recreation and Open Space

For some time it has been known that one of the keys to the success of the new residential community will be a new site plan which is as sensitive to the particular conditions at Columbia Point as the existing one is insensitive. Development proposals must therefore demonstrate an acute awareness of the need for:

- less density in the residential areas
- integration of the housing development with Bayside Exposition Center and other land uses on the peninsula
- opening up waterviews from all parts of the site, from ground level and from the interior of buildings
- provision of internal access to waterfront open space and recreation facilities
- improved security and safety

In relation to open space, it is the intent of the redevelopment program that the waterfront public recreational area, accessible to all future residents of Columbia Point, be continued from Carson's Beach to the Kennedy Library, so that an easement for this use must be provided by the developer along the waterfront edge of the site. If the developer chooses to develop housing on the site of the present City outdoor recreational facilities, then he must provide new similar facilities elsewhere; if not, he must replace or renovate what is there now. Within the residential areas, open spaces in the forms of patios, backyards, playgrounds, tot-lots and sitting areas should also be provided.

4. Infrastructure

One of the assets of Columbia Point is that the infrastructure of public and private utilities and pedestrian and vehicular circulation systems are basically in place. However, there will need to be some improvements made to the existing access and circulation systems, to be funded, it is hoped, largely by UDAG funds through the BRA, but also in part by the developer.

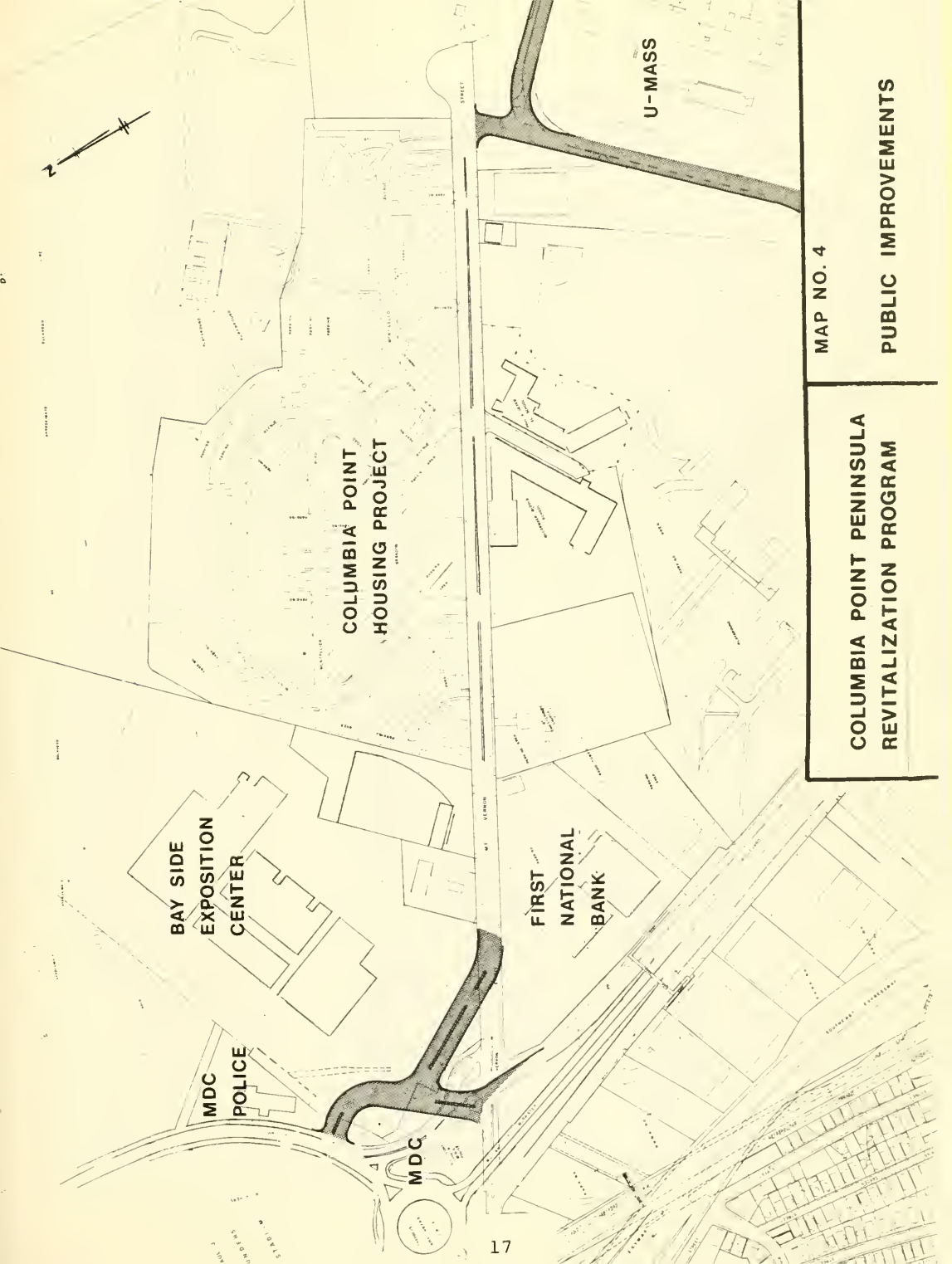
To allow for future development at Columbia Point, the Boston Sewer and Water Commission is currently constructing a 24 to 36 inch diameter separate sanitary interceptor in Mt. Vernon Street and a new transmission main to bring additional water to the area.

As part of its Columbia Point UDAG application, the City has requested \$2.1 million of the \$4.5 million in the Phase I allocation to pay for the engineering and construction of a new, more direct and attractive entrance from Day Boulevard to Mt. Vernon Street capable of handling higher traffic volumes and of providing a stronger connection to the outside community, and for a similar connection between the U.Mass loop road and Mt. Vernon Street at the other end of the development site (see Map 4). The application also requests \$20.5 million for the Phase II development. It is anticipated that the developer may want to use a portion of these funds to upgrade circulation and public amenities on the interior of the peninsula. While the exact definition of these will have to await the selection of the private developer and his plans, it is expected that they might include the landscaping of Mt. Vernon Street, circulation improvements within the Phase II residential parcel, and upgraded vehicular and pedestrian access to the waterfront and to the Bayside retail area.

Development proposals should be responsive to the need for safe and efficient vehicular circulation and provide for safe and direct pedestrian access from all buildings to the waterfront, community facilities, Bayside Exposition Center, the proposed retail site, the MBTA stop and the open space system.

5. Affirmative Action in Hiring and Marketing

The parties believe that the redeveloped Columbia Point should be a racially-integrated community within each income group. The parties also believe that minority persons and public housing resi-



COLUMBIA POINT
HOUSING PROJECT

BAY SIDE
EXPOSITION
CENTER

MDC
POLICE

FIRST
NATIONAL
BANK

U-MASS

MAP NO. 4

COLUMBIA POINT PENINSULA
REVITALIZATION PROGRAM

PUBLIC IMPROVEMENTS

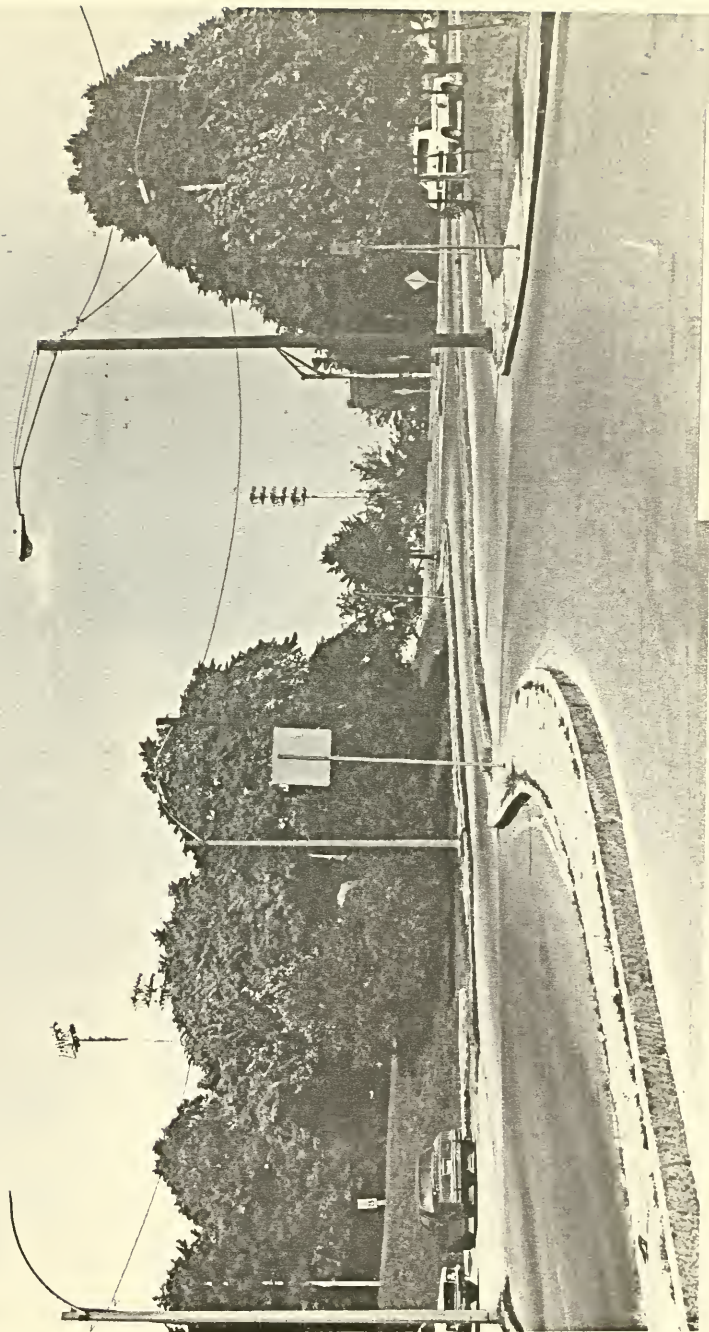


ILLUSTRATION 4.
PHASE I PUBLIC IMPROVE-
MENTS: PRESENT ENTRANCE
FROM DAY BOULEVARD TO
MT. VERNON STREET



ILLUSTRATION 5.
PHASE I PUBLIC IMPROVE-
MENTS: PRESENT ENTRANCE
FROM UMASS LOOP ROAD
TO MT. VERNON STREET

dents must be afforded a fair share of the construction job and permanent job opportunities created by the redevelopment process. As a requirement of all submissions, the developer will be expected to propose specific plans and programs for achieving racial integration and employing minority and public housing residents at Columbia Point (see Appendix B). In addition, once the developer has been selected, the Task Force will appoint its own affirmative action officer to assure the implementation of affirmative action requirements. It is the City's policy that the developer seek to provide 50% of the construction jobs for residents of Boston, 25% for minorities and 10% for women.

See Maps 5-10 for additional information on the existing Columbia Point Housing Project.

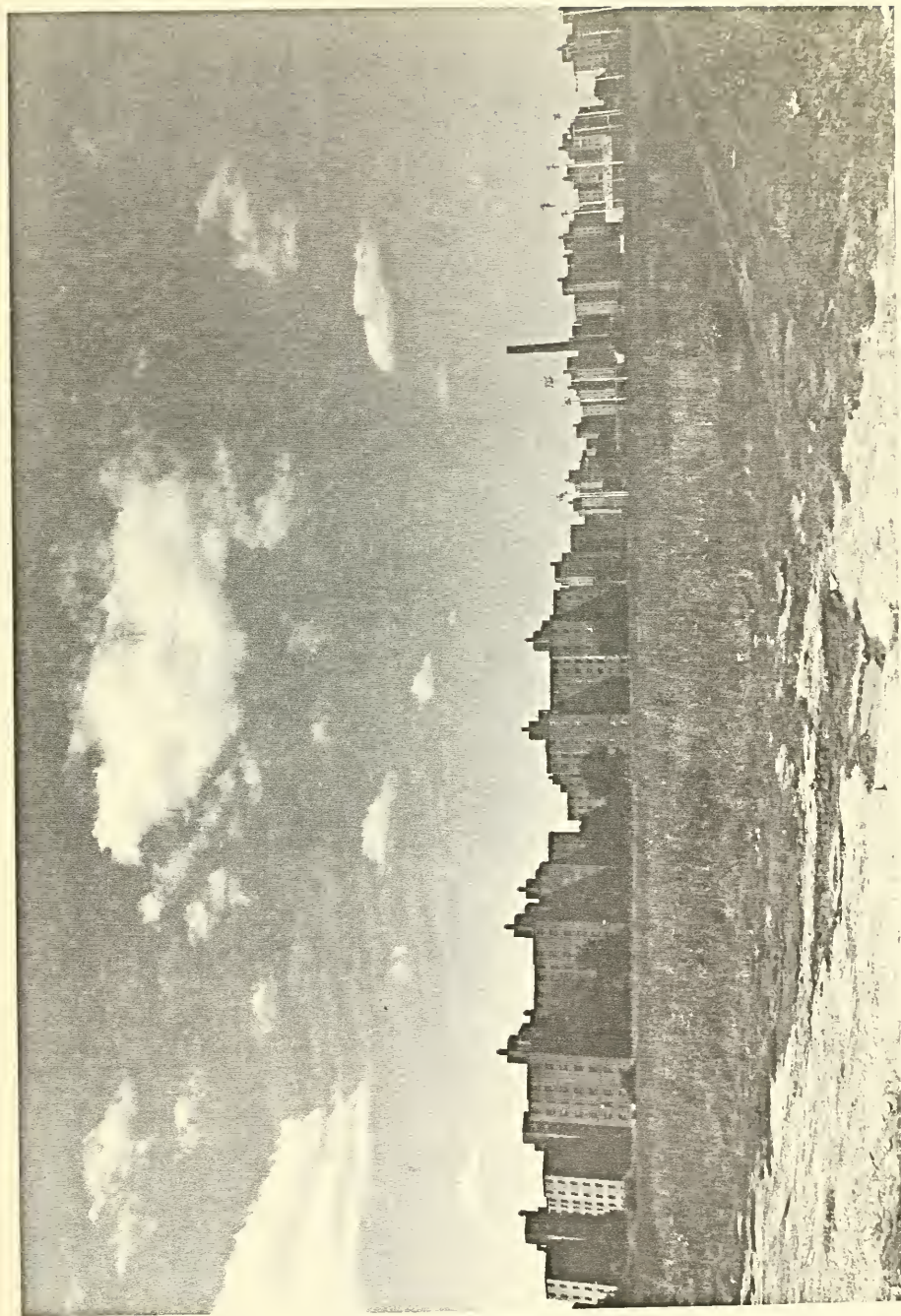
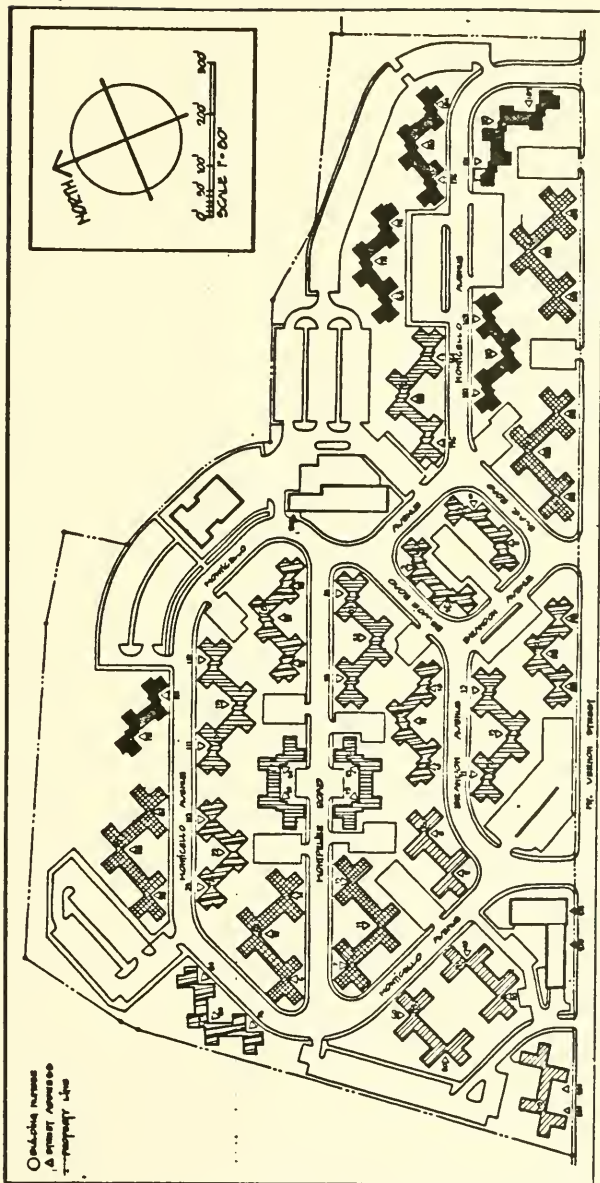


ILLUSTRATION 6.

COLUMBIA POINT HOUSING
PROJECT FROM WATER'S EDGE



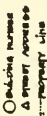
MAP 5

RESIDENTIAL BUILDING TYPES

RESIDENTIAL BUILDING TYPES

- One and two bedroom units
- Two bedroom units
- Three bedroom units
- Four bedroom units
- Three and five bedroom units

COLUMBIA POINT HOUSING PROJECT

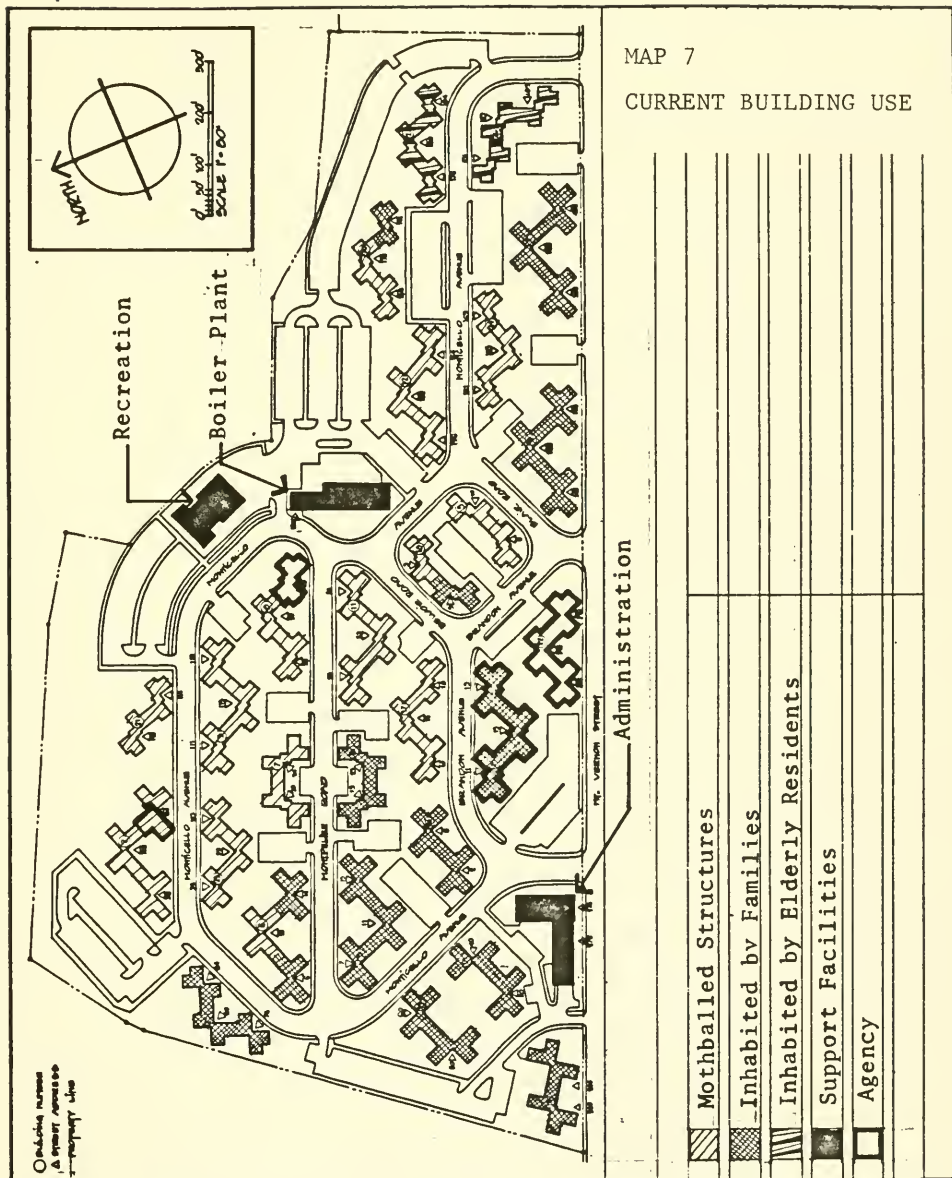


HEIGHT OF BUILDINGS

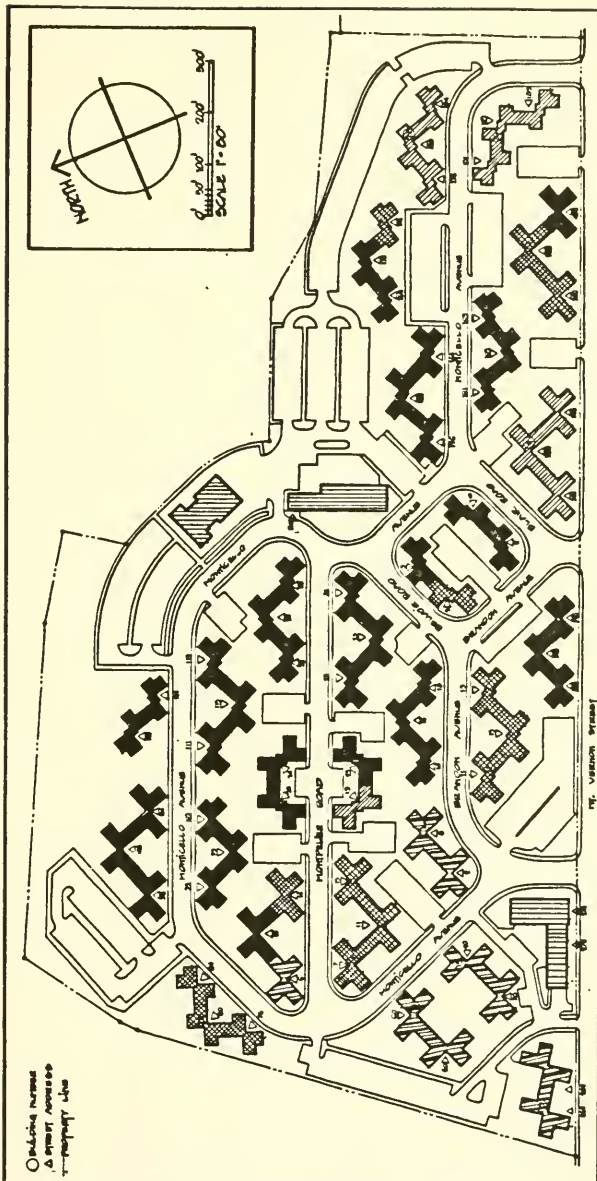
HEIGHT OF BUILDINGS

	One Story Structure
	Two " "
	Three " "
	Seven " "

COLUMBIA POINT HOUSING PROJECT



COLUMBIA POINT HOUSING PROJECT

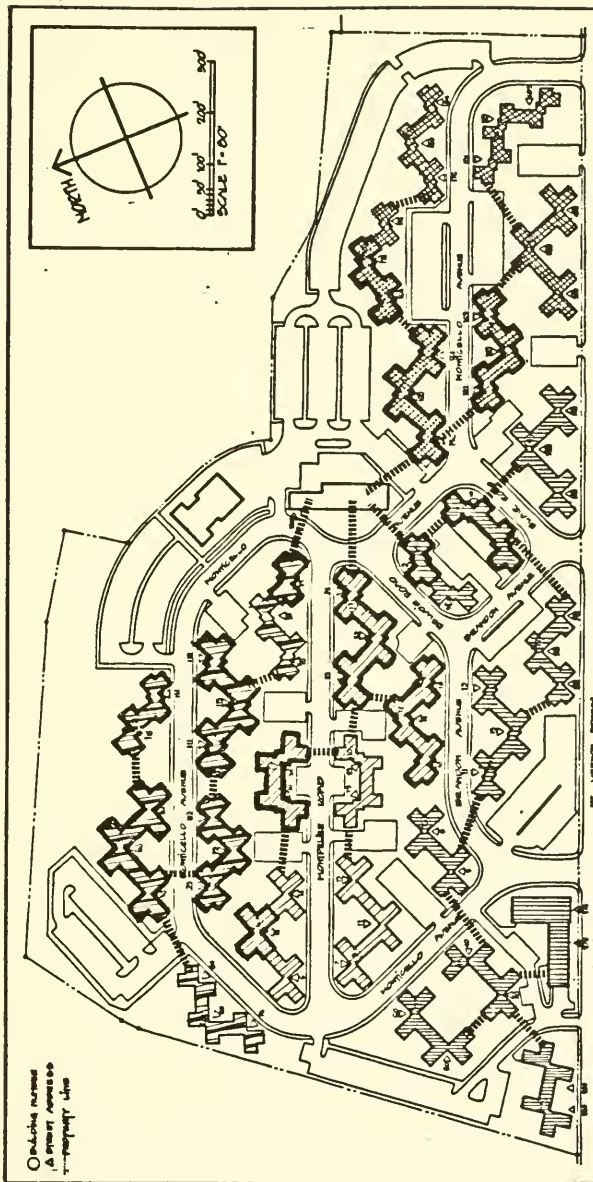


MAP 8

CURRENT OCCUPANCY

CURRENT OCCUPANCY	
Completely empty	
Less than 50% occupied	
More " "	
Completely occupied	
Support Facilities	

COLUMBIA POINT HOUSING PROJECT



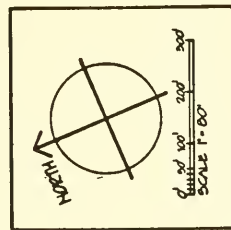
MAP 9

EXISTING UTILITIES
(Heating)

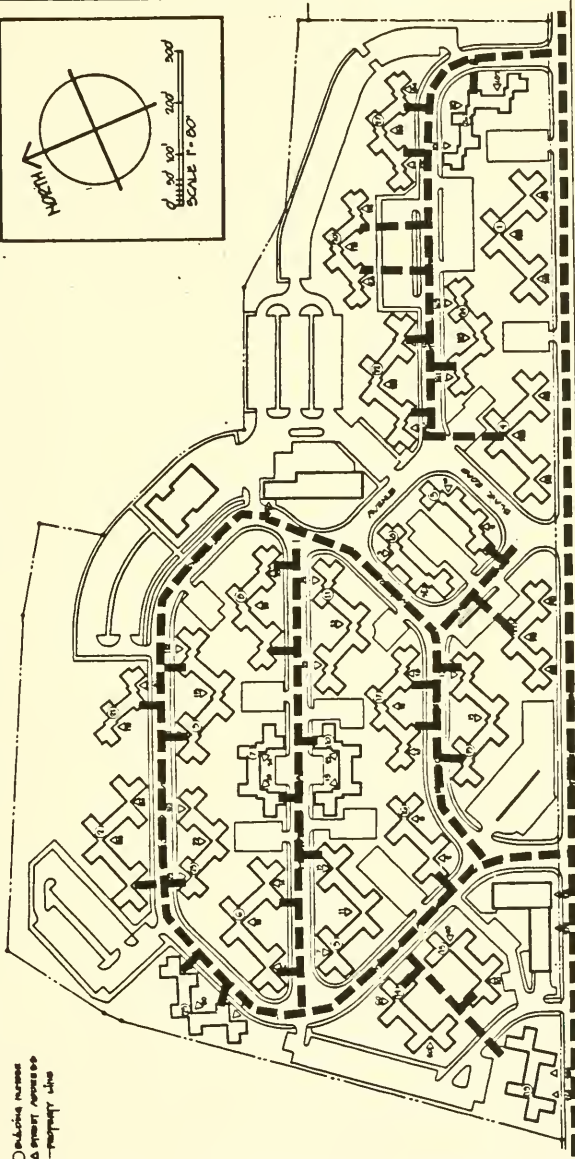
EXISTING UTILITIES

Heating System	Heating pipes
"	"
"	"
"	"
Mothballed Structures	

COLUMBIA POINT
HOUSING PROJECT



Existing roads
 Δ street entrance
 — property line



MAP 10

EXISTING UTILITIES
 (Sewer and Water Lines)

EXISTING UTILITIES

--- Utilities (sewers and water supply)

COLUMBIA POINT HOUSING PROJECT

IV. PUBLIC FUNDING

It is the objective of the parties to have the development carried out, as far as possible, through private funding commitments. The status of public funding of the Phase II development is as follows:

1. The Boston Housing Authority has been awarded \$10,000,000 in Urban Initiatives Funds for Columbia Point by the U.S. Department of Housing and Urban Development. Urban Initiatives funds are subject to statutory requirements which limit their use to eligible work items in a public housing site, such as construction, alteration, demolition or site work, and to State bidding requirements. The BHA is prepared to request waivers of non-statutory requirements to permit the most flexible possible use of these funds. HUD has indicated a willingness to allow maximum flexibility in the use of these funds for the redevelopment.
2. The City of Boston has applied for a \$25 million UDAG grant for the Columbia Point Peninsula Revitalization Program. The application requests first phase funding of \$4.5 million. Of this, \$2.1 million would create new vehicular access from Day Boulevard to Mt. Vernon Street and from Mt. Vernon Street to the Kennedy Library and University of Massachusetts sites. In addition, \$2.25 million would be provided as part of Bayside Associates' permanent financing for the renovation of Bayside Mall into the largest trade center in New England. The repayment of this loan would be directed exclusively to assist the overall financial feasibility of the Phase II residential uses. In Years 1-5, the developer will make interest-only payments on the loan, but starting in Year 6 and continuing through Year 20, will make principal and interest payments so that the \$2.25 million is fully amortized at the end of the twenty-year loan term.

The second phase of the UDAG grant would provide \$20.5 million to help support the creation of the Phase II residential community. The specific uses of these UDAG funds will be determined following the final selection of a private developer for this phase of the Columbia Point Peninsula revitalization. In demonstrating to HUD the need for this financial assistance to the residential project, it was projected that \$16 million of this amount be used to provide part of the permanent financing for the development of 400 moderate and 800 market-rate units. The balance might be used for public improvements, such as landscaping of Mt. Vernon Street and circulation improvements in the development parcel, including improved pedestrian and vehicular access to the waterfront, as well as waterfront improvements.

3. Beyond \$100,000 currently budgeted in Community Development Block Grant funds and \$400,000 contemplated as part of the City's Year VIII Community Development Block Grant application for preliminary engineering, no City funds are presently appropriated for this project. Proposals which provide necessary site improvements without recourse to City funds will be viewed as having a more realistic chance for success than those dependent for their feasibility upon the provision of such subsidies.

4. No funds have been committed by HUD for housing subsidies. Proposals which provide housing for low and moderate income families and individuals without recourse to public subsidy will be viewed more favorably than those which are dependent for their feasibility upon the provision of such subsidies.
5. The Boston Housing Authority's bond indebtedness for the Columbia Point project is currently \$12.9 million. This offering contemplates the sale or lease of the BHA project to the private developer, the proceeds of which will go towards repaying the bonds. The price offered for purchase or lease will therefore be a consideration in the developer selection process.

V. DEVELOPER SELECTION PROCESS

A. Introduction

The process for selecting a developer will be competitive. It will be undertaken jointly by the two public bodies, the BHA and BRA, and the tenants' organization, the Task Force, and will be subject to HUD's concurrence. The final selection by the three parties will require formal designation by the BRA and BHA.

The developer selection process will be conducted in two stages. The first will consist of interested developers submitting their qualifications for the project and the reviewing parties choosing from these submissions a short-list of the three to 5 development teams most closely meeting the selection criteria which follow. The first stage selection process will be based on a point system which has been agreed to by the three parties. In the second stage of selection, the finalist teams will then be asked to participate in the preparation and submission of full development proposals for the site. Final selection will be made after careful and extensive review of the original proposals and additional requested material, after developer presentations and interviews, and after negotiations between the selecting parties and the developers.

This developer selection process will result in the tentative designation of a developer for Phase II of the Columbia Point Peninsula Revitalization Program. The BHA and BRA will offer tentative designation to the selected developer, and the developer must formally accept the designation and agree to abide by the terms and conditions of the designation. The developer must submit a \$100,000 irrevocable letter of credit with its acceptance of the designation. The letter of credit may be called, upon the agreement of the BHA and BRA, if the designated developer, through its own fault, fails or is unable to carry out its responsibilities in the redevelopment of Columbia Point.

The selected developer and the Task Force is to enter into a partnership agreement defining each party's role in the development and management process. It is anticipated that this will occur subsequent to tentative designation.

Once the developer has formally accepted tentative designation, it will take the lead in securing the financial commitments and government approvals necessary to carry out at least the first construction stage of the development. The developer or development partnership will work directly with the BRA and BHA, and in consultation with the other institutions on the peninsula and neighborhood groups, to refine the development, financing, management, marketing, site, construction phasing and relocation plans necessary to carry out the redevelopment within an agreed upon schedule.

If the Task Force has not yet formed a partnership with the developer and thereby assumed decision making responsibilities, the Task Force will retain an approval role over the development plan similar to that of the BRA and BHA. The Task Force will retain such an approval role until it enters into a partnership agreement with the developer. Thus,

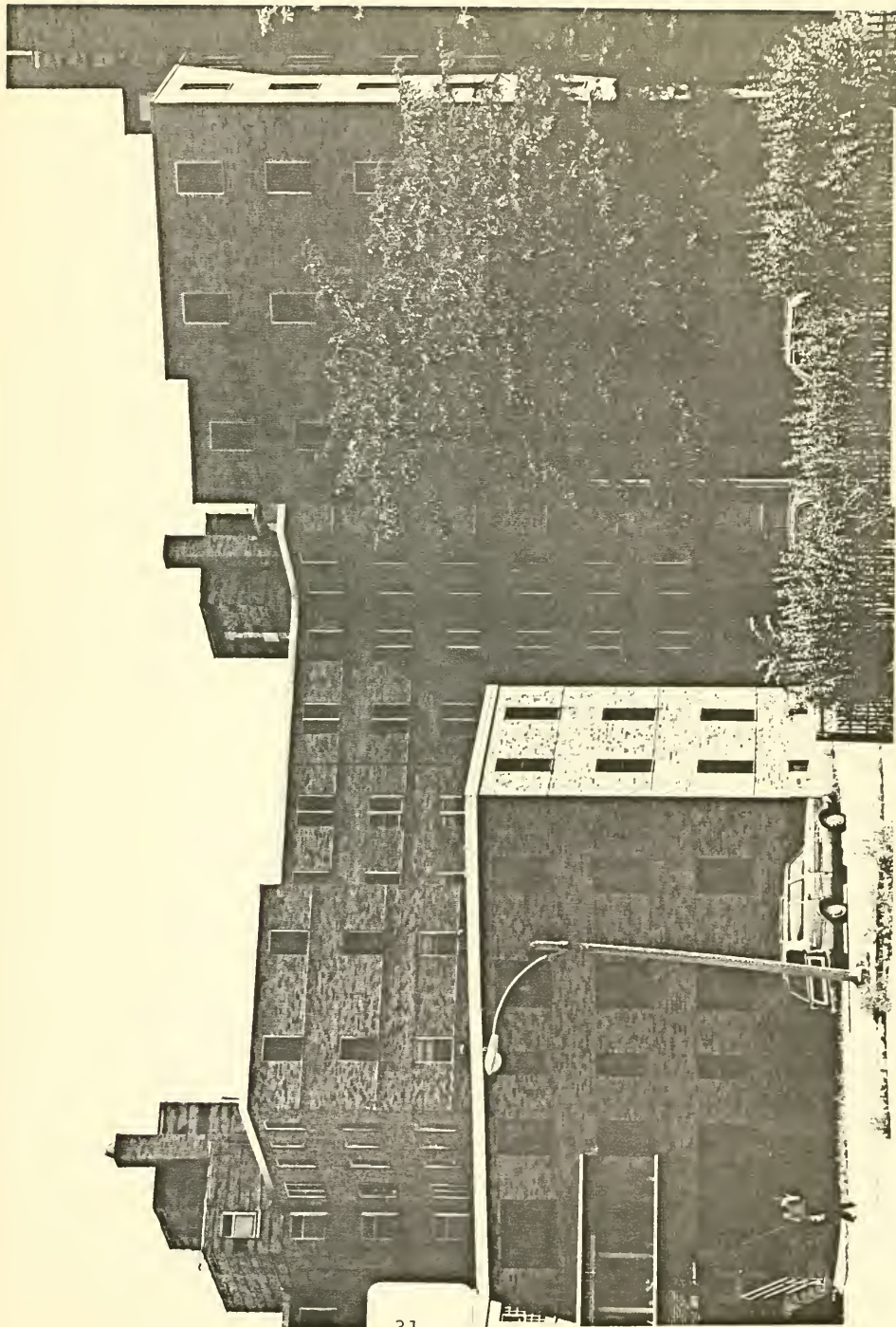


ILLUSTRATION 7.
WALK-UP BUILDING AND
BOARDED-UP MID-RISES,
COLUMBIA POINT HOUSING
PROJECT

whenever the Task Force has a developer role through the partnership agreement, it will cease to have an approval role. Whenever it retains an approval role, it will not also act as a developer.

Upon approval of the above development plans by the BHA, BRA, the Task Force and other public agencies, as necessary, and receipt of preliminary funding commitments and subsidies, final design of both public improvements and housing construction will be prepared. This will occur prior to beginning extensive and detailed work on the construction documents. A final site plan, floor plans, elevations, outline specifications, cost estimates, financial pro forma and detailed time schedule for completion of the initial construction stage will be prepared for review and approval by the BRA and BHA and the Task Force, as necessary.

When all necessary elements of the first construction stage of development have been secured by the developer and approved by the BRA, BHA, and the Task Force, as necessary, depending on the partnership role of the Task Force defined in the partnership agreement, and satisfactory progress has been made toward completing plans for subsequent development construction stages, the BHA and the BRA will grant final designation to the developer.

Immediately following final developer designation the BHA and, if appropriate, the BRA, will complete disposition agreements with the developer for land to be included in the first stage of the redevelopment. The disposition agreement(s) will contain the requirement that the developer assure the continuing presence of four hundred low-income units, as well as other requirements established in this offering.

It is the goal of the parties to choose the development team best able to:

1. Achieve the physical development objectives outlined in Section III, above, namely the construction of 1200-1600 units of new and rehabilitated housing units, related community facilities, streets, open spaces and recreational areas.
2. Achieve the social development objectives outlined in Section III, above, namely an economically and racially mixed community integrated into the life of the City of Boston.
3. Achieve the financial objectives stated in Section IV, above, namely a willingness and ability to carry out and maintain the development with minimal reliance on public funding or subsidies and to offer a purchase or lease price for the project property that will enable the BHA to repay as much of the outstanding indebtedness on the Columbia Point project as possible, consistent with the highest quality development.
4. Achieve the management objectives stated in Section III, above, namely the immediate improvement of the public housing project and the assumption of permanent management responsibility for all the housing units and the involvement of residents, represented by the Task Force, in decision-making about the development and in on-going operations of the project.

5. Achieve the affirmative action objectives stated in Section III, above, and in Appendix B, namely to take affirmative action in hiring minority persons and public housing residents for construction and permanent jobs and to attain racial integration goals in residential occupancy of the housing units.
6. Assure fully adequate capital and operating funds for at least 400 units of low-income (public housing eligible) housing throughout the life of the development.

The rest of this section of the offering lays out, in detail, the submission requirements in both the first and second stages of selection so that developers may determine the extent of involvement that will be required. In addition, the full schedule for submissions, review and selection is included and it is the intention of the parties to adhere to the schedule throughout the process.

B. Schedule for Developer Selection Process

September 12, 1982	Advertisement of Public Request for Developer Proposals.
October 18, 1982	First stage qualifications due from interested developers.
October 18 - November 15, 1982	Review of qualifications - selection of finalists.
November 15, 1982	Finalists notified - asked to proceed with second stage preparation of full development proposals.
January 17, 1983	Full development proposals due from finalist developers.
January 17-March 7, 1983	Review of proposals; presentations and interviews; negotiations with developers.
by March 18, 1983	Selection of developers; tentative designation by BRA and BHA.

C. First Stage Developer Qualifications Submissions

1. General

- a. Each development team must include the following components:

Development
Management
Construction Contracting
Architecture (including Landscape and Planning activities)
Engineering
Legal

Each developer submission shall be accompanied by a Letter of Interest listing the development team members (including a chief contact person), briefly summarizing the team's qualifications and past experience relevant to the proposed Phase II development, and indicating the team's willingness to prepare full development proposals, if selected as a finalist, and to proceed expeditiously with all aspects of the development if designated as the preferred developer.

The Letter of Interest should also describe the functional, corporate or other legal relationships among the members of the development team in carrying out the Phase II development.

- b. In addition to submitting their qualifications for consideration in the first stage of selection, developers may include comments, questions, or requests for clarification regarding any aspect of Columbia Point, this Request for Developer Proposals, the selection process, etc.
- c. Ten copies of all materials should be submitted to each of the following:

Robert J. Ryan, Director, Boston Redevelopment Authority,
One City Hall Square, Boston, MA 02201

Lewis H. Spence, Receiver/Administrator, Boston Housing
Authority, 52 Chauncy Street, Boston, MA 02111

Roger Taylor, President, Columbia Point Community Task
Force, Inc., 320 Mt. Vernon Street, Dorchester, MA 02125

Materials must be received by 5:00 PM October 18, 1982.

- d. A certified check of \$3,000 drawn to the order of or assigned to the Boston Redevelopment Authority must be submitted along with the development team's qualification materials. The Authority is under no obligation to earn interest. Those applicants that are not successful in the first stage qualifying process will be refunded \$2,500. Finalists asked to proceed with the second stage preparation will be refunded \$1,000 if not selected as developer for the project.

2. Developer Qualifications

a. Submission Requirements

For the Development Component, the team shall submit:

- (1) A statement of Previous Housing Development Experience showing all projects in which the principals of the proposed development entity have participated as general partners or equivalent. The statement should list all projects, showing their location, size, ownership type and development cost. It should also describe the construc-

tion and permanent financing arrangements for each project, showing the nature and extent of the participation of financial and lending institutions and of the developer. In particular, the developer's current equity interest in each project should be indicated. Where applicable, the statement should indicate what public program the project was developed under and what income level (low, moderate, market rate or mixed) it serves. It should also describe the type of development (high, mid or low-rise; apartments, townhouses, separate houses, etc.) and the architect, landscape architect and other consultants used on each project. The nature and extent of community and/or tenant participation in each development should also be disclosed. With respect to all projects listed, the statement must disclose and explain:

- (a) Current financial default of more than 60 days duration.
 - (b) Mortgage assignment or workout arrangement
 - (c) Foreclosure
 - (d) Bankruptcy
 - (e) Litigation relating to financing or construction of the project which is pending or which was adjusted with a finding of liability against the developer.
 - (f) Real Estate Tax Delinquencies
- (2) A personal Financial Disclosure statement for each person who serves as a principal in the proposed project. This statement shall be substantially equivalent to FHA Form 2417, attached as Exhibit C.
 - (3) A financial statement of the development entity prepared by a Certified Public Accountant. The statement should show assets, liabilities, and net worth of the firm, and should include information on all General Partners or principal shareholders.

All financial information will be held confidential.

b. Qualification Criteria

In order to be found qualified, developers must demonstrate:

- (1) Successful completion of at least six projects of 200 units or more, or aggregate development of not less than 2,000 units.
- (2) A successful track record on past projects with financial institutions and continuing strong working relationships with financial institutions.

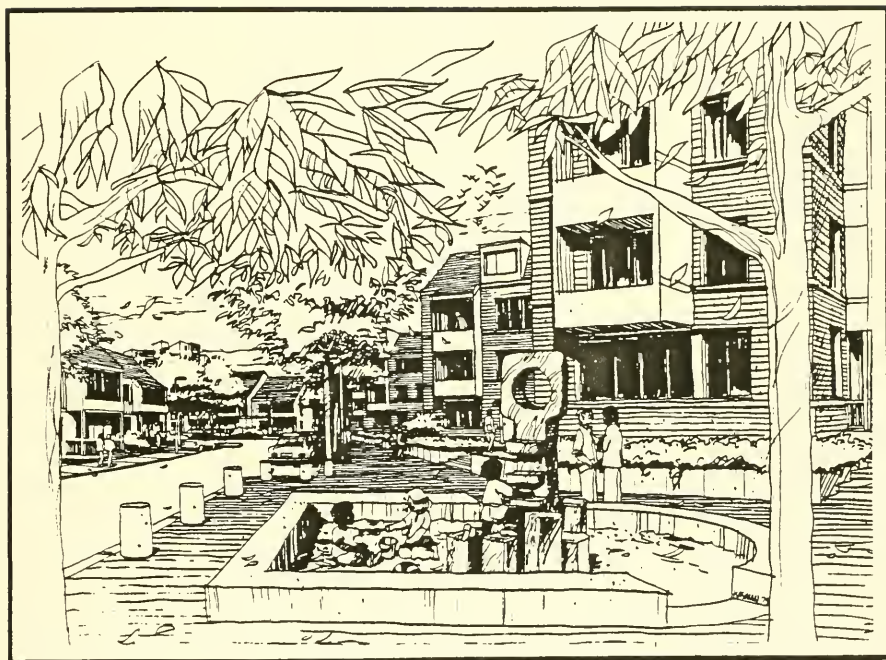


ILLUSTRATION 8.

RENDERING OF RENOVATED
WALK-UP BUILDINGS

- (3) All projects are current, not more than 60 days overdue.

No more than 10% of the total units developed have been assigned, foreclosed or are under a workout arrangement.

Bankruptcy has not been declared by any developer entity or principal thereof associated with the Columbia Point Project.

In any litigation, the developer has not been found liable for financial irregularities relating to the project or for construction defects totalling more than 5% of the total development cost of the project.

- (4) Net worth of the developer entity and/or the principals is at least \$1,000,000.
- (5) At least one successful experience which significantly involved resident organizations in the planning and carrying out of development activities.

3. Management Qualifications

a. Submission Requirements

For the Management Component, the team shall submit:

- (1) A statement listing all properties under management now or in the last three years including name, owner, location, type of site, type of construction, income and subsidy mix, number and size of units, financing, mortgage status, success in achieving and sustaining goals of affirmative marketing plans. If any management contract has been terminated, show when and explain the reasons for termination.
- (2) A statement listing any litigation pending or adjudicated with a finding of liability against the management entity in the previous five years relating to financial aspects of management, alleged discrimination in hiring, tenant selection or tenant relationships, or otherwise bearing upon the entity's effectiveness as a manager.
- (3) A statement disclosing and explaining the kind of matters listed in paragraph 2a(1)(a) through 2a(1)(f) above, if different from matters disclosed therein.
- (4) A list of all Certified Housing Managers employed by the entity and their current assignments.
- (5) A copy of the current personnel policy, including affirmative action hiring plan.

- (6) Examples of at least two Management Plans for previous developments located in urban settings, one a mixed-income and one a market-rate development.

b. Qualification Criteria

In order to be found qualified, managers must demonstrate:

- (1) Successful management of at least six projects of 300 units or more, and an ability to manage not less than a total of 2000 units concurrently.
- (2) The same factors listed in 2b(2), (3) and (4), above with regard to the management entity.

No judicial findings of liability relating to financial irregularities or discrimination and no history of frequent exacerbated landlord/tenant relationships.

- (3) Successful implementation and maintenance of affirmative marketing efforts.
- (4) Ability to manage mixed-income and market-rate projects.
- (5) A history of equal opportunity in employment and of employment of certified housing managers.

4. Contractor - Submission Requirements

- (1) A statement of bonding capacity.
- (2) A list and brief description of previous completed developments of the complexity and magnitude of Columbia Point, and letters of reference from clients for those projects with regard to contractor's ability to complete the project on a timely basis and within budget.
- (3) A description of affirmative action measures taken by the contractor on previous projects to train and employ minority workers and to utilize minority construction contractors; a description of the results achieved by such measures, including a list of minority construction firms used in past construction work, and any proposed joint venture or subcontracting relationships with minority firms being considered for Columbia Point development, and in addition, a description of any negotiations or special arrangement with unions made in an effort to achieve affirmative action measures.
- (4) Statement as to pending or previous litigation in which the contractor was alleged or found to be liable for construction deficiencies. Statement as to debarments, suspensions or temporary denials of participation for construction defects not satisfactorily corrected.

5. a. Architect - Submission Requirements

- (1) GSA Forms 254 and 255, attached as Appendix D, updated to reflect all significant current and past activities of the firm relevant to the Columbia Point development.
- (2) A sample of renderings, schematics and development programs from other family housing developments, a recreational or community use facility, and a commercial facility for which the architect provided design and construction administrative services.
- (3) A description of previous experience with the rehabilitation of existing residential buildings and with new construction, and work with tenant groups in establishing space programs, phasing plans and design.
- (4) Statement as to pending or previous litigation finding or alleging liability for design deficiencies.

b. Landscape Architect - Submission Requirements

- (1) GSA Forms 254 and 255, updated to reflect all significant current and past activities of the firm relevant to the Columbia Point development.
- (2) A sampling of site plans, schematics, renderings, or photos of landscape work done which is relevant to the proposed work at Columbia Point, including particularly any previous experience with waterfront areas in terms of design and choice of suitable materials.

c. Community Planner - Submission Requirements

- (1) A description of previous experience in the development of integrated, mixed-income, mixed-use communities; in projects in which extensive management, social and economic programs have been combined with major physical construction; and in working with tenants and other community groups.

6. Other Team Member Qualifications

a. Engineer - Submission Requirements

- (1) A list of previous experience on projects of the magnitude of Columbia Point, identifying particularly:
 - o experience with building on soil conditions similar to those at Columbia Point, i.e., largely fill;
 - o experience with design and construction of waterfront and water-related improvements;

- o experience with utilities and circulation;
- o experience with total and partial demolition of masonry buildings.

b. Lawyer - Submission Requirements

- (1) A description of previous experience with housing or mixed-use developments; with tenants and other community groups; with complex private/public relationships; with condominium and cooperative forms of ownership; with public programs and funding; and with syndication.

7. All Team Members - Submission Requirements

- (1) A description of all other developments pending or under construction and not previously listed in which a member of the proposed development team has major responsibility, and a description of the team member's responsibility.
- (2) A description of past minority utilization practices, indicating the proportion of minority persons working in professional, paraprofessional, management, and clerical positions and a description of recruitment and training efforts currently being utilized.

D. Second Stage Development Proposals

This section describes the submission requirements for the 3-5 finalists chosen to participate in the second stage of selection. The full Development Plan which they would be asked to prepare includes:

1. Overall Development Program and Strategy

A narrative description of the developer's proposal, supplemented by graphic presentations, where appropriate, addressing the following points:

- a. number, size, ownership type, family orientation and resident income and age distribution, of proposed housing units;
- b. which existing public housing buildings the developer plans to retain, how those retained will be used, and which buildings he plans to demolish partially or totally;
- c. the nature of the relationship between the developer and the Task Force, in particular a draft of the proposed partnership agreement, and a description of the Task Force role in development, management, marketing and affirmative action, and how the developer plans to provide financial support for the Task Force;

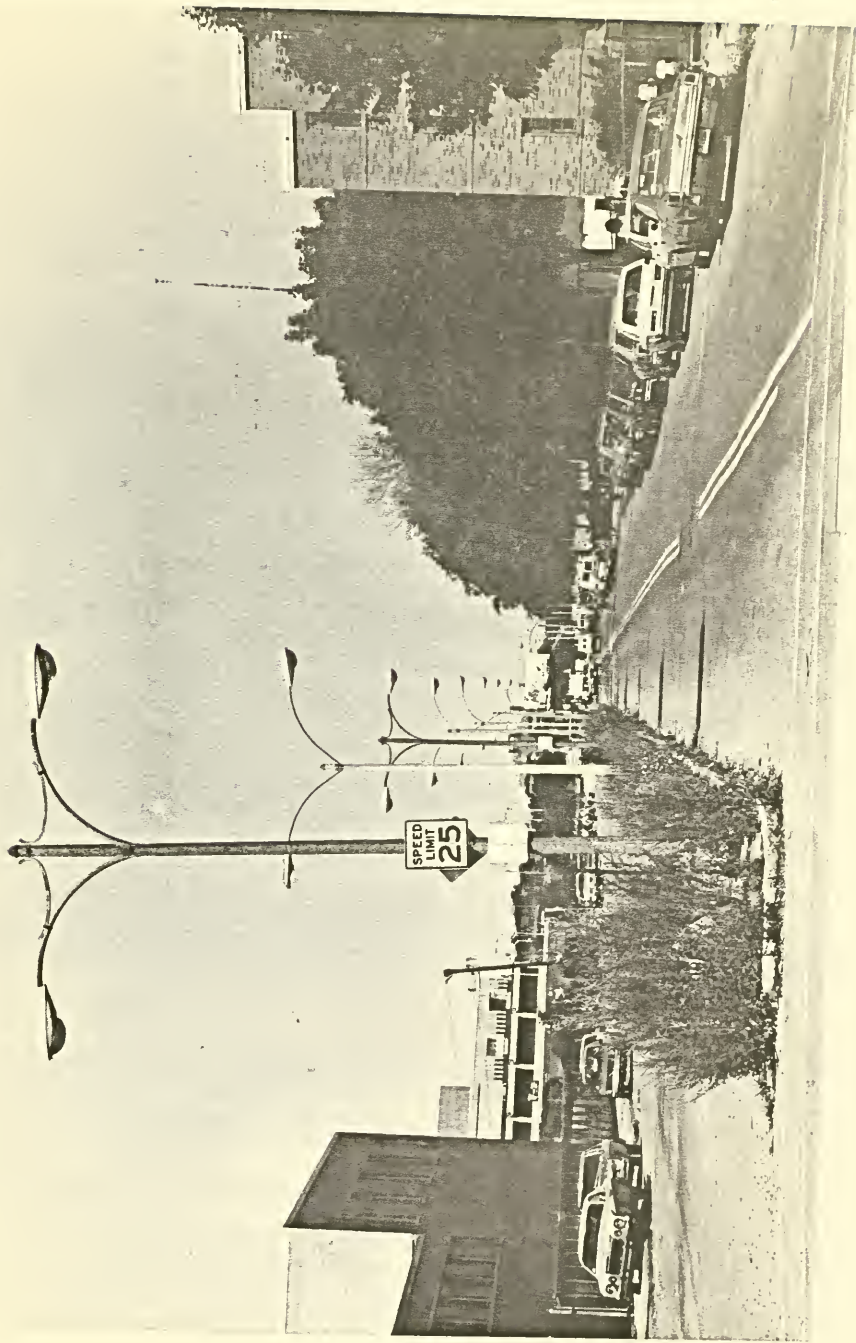


ILLUSTRATION 9.

PHASE II PUBLIC IMPROVE-
MENTS: MT. VERNON STREET

- d. commercial and other non-housing components of the proposed development, defining clearly which components the developer plans to develop;
- e. how the developer plans to achieve affirmative action objectives in hiring, integration and marketing;
- f. how the developer would specifically propose modifying the existing utility, vehicular, pedestrian, open space and recreational facilities to support the residential development, and how he would specifically allocate design, engineering, construction, funding, and management responsibilities for each of these elements between himself, other private entities, and identified public agencies.

2. Staging of Development

A description of the staging plan for the development throughout the planning and construction periods. Identify for each stage:

- a. parcel(s) to be used and/or specific areas of the parcel(s);
- b. amount and location of demolition;
- c. number, size, ownership type, income and age distribution, family type, rehabilitated or new, and location, of housing units to be provided in that stage;
- d. public and private utility, circulation, recreational, community commercial, and other non-housing improvements;
- e. management improvements and initiation of private housing management services; and
- f. actions to be taken under the marketing plan.

The staging plan shall also identify how and where current Columbia Point residents will be relocated, the number of moves required prior to assignment to a permanent new or renovated unit, and whether any interim rehabilitation for relocation will be required.

The developer shall submit a proposed schedule for the development which places the stages defined above in a specific time frame, identifies when the Phase II site must come under its control and when necessary public approvals and development permits must be initiated and obtained.

3. Costs and Financing

The proposal shall include preliminary cost estimates for all aspects of the development, a description of the preliminary financing package, and an evaluation of the financial feasibility of the proposed development as described in the developer's submission.

Cost estimates shall include: an "order of magnitude" cost estimate for the entire project; estimated land cost; estimated per unit construction costs for the new and rehabilitated housing respectively; estimated per unit operating costs of the housing; and estimated costs for each of the proposed non-housing components and infrastructure facilities proposed to be developed either by the developer or by other entities or agencies.

The preliminary financing package shall describe what funds the developer and other members of the development team will commit, what other private and public funds will be sought, from what sources, when these funds might be available, and shall specifically describe how the low, moderate, and market units respectively are proposed to be financed. In particular the developer should be careful to describe how he will use the Urban Initiatives funds and the proposed UDAG subsidy. The financing package should also describe the proposed ownership mix of the development (rental, cooperative, condominium, etc.), and what income groups each ownership form would serve.

Full development and operation pro formas for the project demonstrating its financial feasibility shall be included here.

4. Design

The developer shall submit a preliminary site plan for the entire proposed development site (at 1"=40'), a somewhat more detailed preliminary site plan for the proposed first phase (at 1"=20') and a study or working model of the entire site at the same scale. The site plans should indicate clearly: building types, number of units proposed in each building, housing locations and density, extent of demolition and rehabilitation, and relation of proposed housing to open spaces, recreational facilities, pedestrian and vehicular circulation, and parking. The developer shall also submit the perspective sketches at ground level showing several selected views of rehabilitated existing buildings and new construction in relation to pedestrian and vehicular circulation systems and to the water. In addition, the developer shall submit preliminary schematic designs for the reuse of an existing mid-rise building on the BHA site (Building 17) and for a new low-rise building or cluster of townhouses.

Design submissions material related to these two buildings should include:

- a. Site plan showing relationship of the building(s) to outdoor space, parking, pedestrian and vehicular circulation systems, and orientation to the water.
- b. Plans of the ground floor (and environs) and upper floors at 1/8"=1'.
- c. Waterside and opposite side elevations at 1/8"=1'.

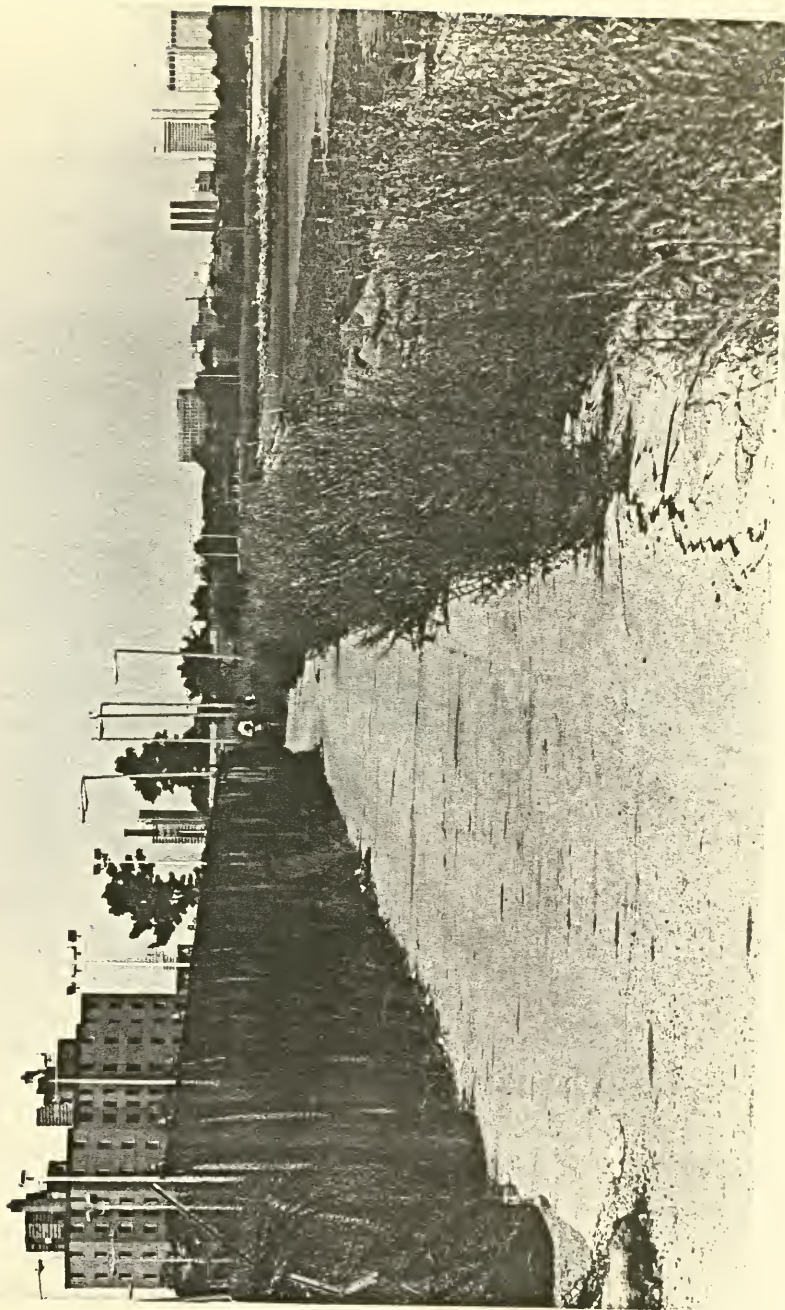


ILLUSTRATION 10.
RELATIONSHIP OF COLUMBIA
POINT HOUSING PROJECT
TO THE WATER

- d. A narrative description of the major design elements of the reuse and new building program.
- e. A preliminary cost analysis on both a unit and building basis.

The proposal shall also demonstrate, either graphically or through narrative, how the proposed design responds specifically to the three parties' concerns regarding:

- o integration of the housing development into a cohesive, mixed-income community;
- o internal access by the community to waterfront open space and recreational facilities, separated from general public access to the waterfront;
- o integration of the housing development with land uses on the Peninsula and with the rest of the City;
- o suitability of the proposed design for a family development; and
- o how the proposed design contributes to the security of housing residents.

5. Specialized Sub-Plans

In addition to the description of a proposed development plan as required above, the developer shall submit sub-plans discussing its proposed approach to three areas of concern: housing management, affirmative marketing and integration, and affirmative action in hiring. This subsection outlines the required contents of each subplan.

a. Housing Management

The developer shall submit (1) an interim management plan for existing public housing covering the period prior to the time current residents are permanently rehoused in new and renovated units; and (2) a preliminary permanent management plan for all new and renovated housing, related community facilities and those recreation facilities that generate income. Each plan shall clearly identify those management functions for which the private developer is prepared to take responsibility, either directly or under contract with appropriate public agencies.

The interim management plan shall identify the point in the planning and redevelopment process at which the developer would enter into a contract with the BHA for interim management. This plan should include an analysis of BHA standard private management agreement (which will be made available to the selected finalists) and recommended changes; estimate of per unit cost for private management; proposed management budget

including salary scales; routine and preventive maintenance schedules; and a security plan coordinated with possible publicly-funded security programs.

The permanent management plan should include: management staffing (reflecting affirmative action and tenant hiring goals and training programs as described more fully in the Affirmative Action subplan required below); tenant selection; assignment and eviction criteria; tenant grievance procedures; general maintenance, repair, preventive maintenance and inspection programs including plan for a periodic inspection of major operating systems and plan for reporting, logging and completion of repair orders; security plan including staffing; and a financial plan that includes a proposed management budget and indicates the proportion of rental income earmarked for management services; and an approach to private management of public facilities such as streets, lighting, parks, bus shelters, and community facilities. As part of this submission, the developer should describe how management, tenant assignment, and security operations will be experienced (after the new management takes over and after renovation is completed) by low, moderate and high-income families in one of the typical existing 36-unit buildings.

b. Affirmative Marketing and Integration

The developer shall submit a preliminary affirmative marketing and integration subplan which demonstrates specifically how the developer would achieve and maintain in all phases of the development racial integration and the required income mix. The plan shall describe the developer's overall strategy for changing the public image of Columbia Point and shall include a timetable, a description of staffing and budget needed to undertake the described efforts and reach the defined goals; and a definition of the roles of all involved parties, public and private.

c. Affirmative Action in Hiring

The developer shall submit a preliminary affirmative action plan for the training and employment of public housing residents with first preference to Columbia Point residents in construction work at Columbia Point. This plan shall include estimates of construction workforce and apprentice needs by trade for each year of the construction period; numbers of public housing resident laborer and apprentice positions by craft and year of construction; projections of future work of the private developer to which residents can be assigned for training; and provision of pre-training, high school equivalency work, and additional support services to facilitate resident employment. This plan shall also include a description of any negotiations or special arrangements with unions deemed necessary to accomplish affirmative action measures.

Developer applicants will also submit preliminary affirmative action plans covering employment and procurement for each of the following areas involved in the proposed development: (1) construction management, (2) design and other professional services, (3) housing management including interim management, (4) business development, and (5) social service and recreational programs. These plans will include provision for recruitment, hiring, training, and advancement of minorities and low-income Columbia Point residents. Training shall develop technical and management skills. Work opportunities shall be provided in integrated working situations involving existing employees, and shall lead to permanent job status and to promotion within the particular company and field.

Employment goals for minority persons and public housing tenants will depend upon the availability and skills of such persons and upon projections of job openings. The Task Force will inventory the availability and skills of all Columbia Point public housing residents and provide this information to all developer applicants. Realistic projections should be made of employee turnover and job creation. Employment goals shall be specified by number of minority persons and public housing tenants, types of jobs, timetable, and amount of training required.



COLUMBIA POINT RESIDENT REHOUSING AGREEMENT

The Columbia Point Community Task Force, Inc. (Task Force), the elected representative of Columbia Point residents, the Boston Housing Authority (BHA), and the Boston Redevelopment Authority (BRA) are working together to realize the revitalization and redevelopment of Columbia Point. An essential part of that redevelopment is to ensure that all current residents who wish to do so can continue to live at Columbia Point in a new or renovated unit, and that such units shall be comparable to and uniformly mixed with units for other income groups.

1. ACTIONS TO BE TAKEN BY THE TASK FORCE, BRA, AND BHA

The Task Force, BRA and BHA agree to take all necessary and appropriate actions to ensure that current residents (as used herein, the term "residents" shall mean all residents of Columbia Point who comply with the conditions set forth below) will have the opportunity to remain at Columbia Point. These actions shall specifically include, but not be limited to, the following. The BHA agrees not to spend the \$10 million earmarked for Columbia Point under the Urban Initiatives program on any housing plan, or to sell or lease for redevelopment any of its property at Columbia Point, unless all residents are guaranteed the opportunity to live in new or renovated units at Columbia Point. The Task Force agrees not to approve any housing development program that fails to assure that current residents will be offered new or renovated units at Columbia Point. The Task Force agrees that in its capacity as a co-developer it will provide a guarantee that all residents will be offered a new or renovated unit at Columbia Point. The BRA agrees not to

propose, approve or adopt any urban renewal plan under M.G.L. c. 121B, any c. 121A agreement, any land disposition agreement, or any other plan for the residential housing redevelopment of Columbia Point, unless such urban renewal plan, 121A agreement, other plan or land disposition agreement contains a guarantee that all residents at Columbia Point will be offered new or renovated housing at Columbia Point.

2. CONDITIONS OF THE GUARANTEE

The guarantee of rehousing will be subject to the following conditions and restrictions.

- a. The guarantee will cover residents who, as of the date of this agreement, are recognized by the BHA as lease holders at Columbia Point or heads of currently doubled-up households who are scheduled by the BHA to move into their own units at Columbia Point.

Immediately after execution of this agreement, a list of the residents to whom the guarantee will apply will be compiled by the three parties. To verify the accuracy of this list, all residents on it will be notified that they are entitled to a guarantee and will be required to acknowledge receipt of the notice. Residents not listed who can establish their right to a guarantee will be added to the final list of residents entitled to a guarantee. After verification by the BHA, this list will constitute the list of certified residents eligible for the guarantee.

- b. A resident will not receive a guarantee, or the guarantee will be void, if a resident moves from Columbia

Point, unless the BHA, BRA or the codevelopers relocate her/him because of the redevelopment or because there is no decent, safe, or sanitary apartment available for her/him at Columbia Point. Any resident relocated temporarily or permanently during the redevelopment process shall be entitled to relocation benefits under applicable law, including the Federal Uniform Relocation Act, 42 U.S.C. 4601, or the state relocation act, M.G.L. c. 79A, if applicable or to such other benefits as may be agreed to among the parties and approved by HUD.

- c. The resident must abide by the provisions of her/his current BHA lease or future BHA lease agreements.
- d. The unit the resident will be offered will be appropriate to the household income (rents shall not exceed 25% of gross income or other applicable HUD guidelines for public housing rents if the household income falls within public housing eligibility guidelines, or guidelines for other subsidized housing rents if the household income falls outside of public housing guidelines but within such subsidized housing guidelines) and other eligibility qualifications such as household size or age.
- e. If the resident household's income exceeds eligibility for subsidized housing before the household has been offered an appropriate new or renovated unit at Columbia Point, the guarantee shall remain in effect (i.e., the household will be offered a unit appropriate to its income and other eligibility qualifications). If the resident household's income exceeds eligibility for subsidized housing after the household has

moved to an appropriate unit, the household shall not be subject to eviction proceedings because of income. If the household is required by law to move from its unit, however, the household shall have priority for residency in market rent units on the Columbia Point peninsula.

- f. In case of death, divorce, separation or other long-term absence of the individual leaseholder(s), the guarantee may be transferred upon notification to the BHA to an otherwise eligible adult who has been recorded in BHA records as a bona fide Columbia Point household member.
- g. The guarantee will not be transferable to any other resident or non-resident nor to any relative except as above.
- h. A household's guarantee will continue in effect until that household has been offered an appropriate new or renovated unit at Columbia Point.
- i. All disputes concerning the rights of specific residents under the guarantee will be resolved pursuant to the BHA grievance procedure.
- j. No special conditions of eligibility other than those specified herein shall be established, by lease or otherwise, as a condition for maintaining the guarantee.

3. CONDITIONS OF CONTINUED RESIDENCY

The Task Force, BHA and BRA and their successors in interest shall not discriminate against holders of the guarantee in the terms, conditions or privileges of rental or sale of, or in the provision of services or facilities in connection with, new or renovated units at Columbia Point. This provision

shall be included in any urban renewal plan under c. 121B, c. 121A agreement, and/or other redevelopment plan for Columbia Point and in any document executed by the BHA or BRA disposing of or leasing real property for residential use at Columbia Point.

4. REPRESENTATIONS, ENFORCEABILITY, ETC.

The BRA represents that this agreement has been reviewed and approved by the Mayor of the City of Boston. The Task Force, BRA and BHA represent that the representatives named below have been duly authorized to sign this agreement in behalf of the respective parties and to bind them and their successors in interest. The Task Force, BRA and BHA further agree that this agreement shall be legally enforceable by any of the parties hereto or their successors in interest, and by residents of Columbia Point.

5. TERMINATION

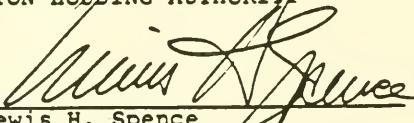
This agreement shall be terminated only in accordance with the provisions of this section. If any one of the parties wishes to terminate this agreement, that party shall so state in writing to each of the other parties. The parties may thereupon agree in writing to terminate this agreement. If all parties do not agree to terminate, the parties shall settle the disagreement by arbitration in accordance with the Commercial Arbitration Rules of the American Arbitration Association. The agreement shall be terminated only if the arbitration panel concludes in writing, after reasonable investigation, that the development objectives established by the Columbia Point Peninsula Redevelopment Agreement cannot be carried out by the three parties.

In this event the parties agree that any new or renovated housing developed on the peninsula by or through the approval of any of the three parties shall provide appropriate units for Columbia Point residents.

The parties acknowledge that the lists of current residents who are leaseholders (see Enclosure #1) or heads of currently doubled-up households (see Enclosure #2), and who are to be entitled to a new or renovated unit after the redevelopment of Columbia Point are incorporated by reference into this agreement and said lists will be further verified as provided by the notice provision of Section 2(a) of the Agreement.

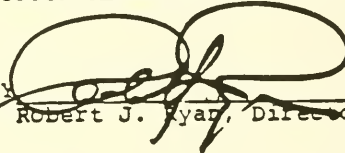
BOSTON HOUSING AUTHORITY

BY


Lewis H. Spence
Receiver/Administrator

BOSTON REDEVELOPMENT AUTHORITY

BY


Robert J. Ryan, Director

COLUMBIA POINT COMMUNITY TASK FORCE
INC.

BY

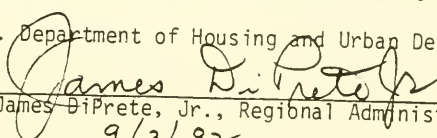

Terry Mair, President

Apr. 18, 1981
Date

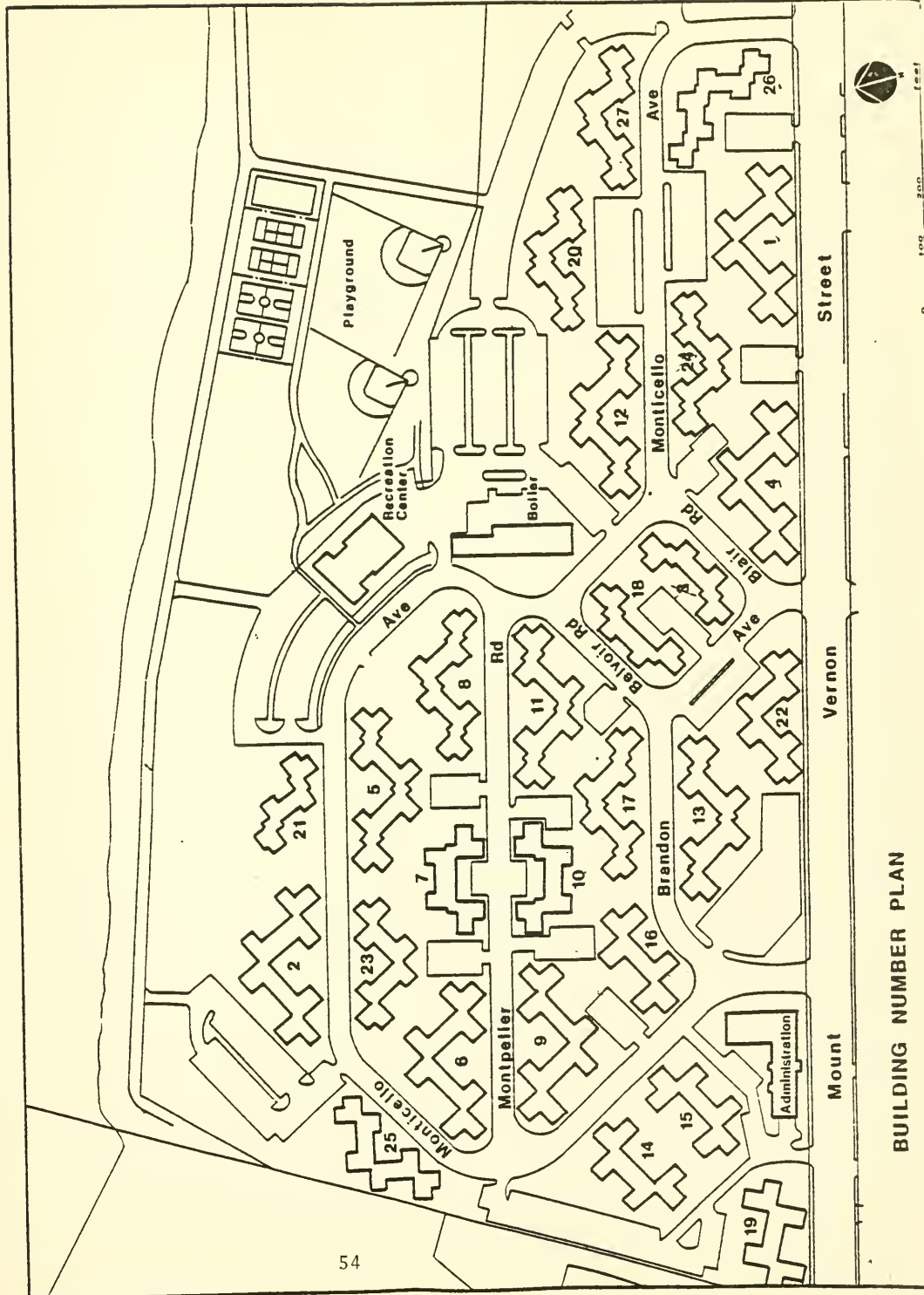
The Department of Housing and Urban Development (HUD) recognizes and endorses the objectives of this agreement. HUD hereby agrees to cooperate with the Task Force, the BHA, and the BRA, in ensuring that current residents of Columbia Point will have the opportunity to remain permanently at Columbia Point as set forth above.

U.S. Department of Housing and Urban Development

By:


James DiPrete, Jr., Regional Administrator

9/3/82



APPENDIX B

AFFIRMATIVE ACTION OBJECTIVES

The BRA, BHA and Task Force have adopted the following goals with respect to residential occupancy and construction hiring:

A. Residential Occupancy

In meeting the submission requirements, preparing the partnership agreement between the developer and Task Force and completing the development plan for final developer designation, a plan for meeting specific racial integration goals must be developed by the developer and approved by the BHA and BRA. The percentage goals as envisioned by the Three Parties are:

1. Although initially the low income units will house the predominantly minority present residents, over the long term the parties hope that at least 25% of units will be occupied by non-minority persons.
2. Not less than 30% of the moderate and market rate units shall be occupied by minority families or such higher percentage that is commensurate with the minority proportion in the City of Boston population.

The plan for meeting these goals shall address marketing strategies, orientation sessions for present and new tenants, tenant selection procedures with existing tenant involvement, and design and staging provisions which support full integration of the development.

Developer applicants shall be responsible for affirmatively marketing the units to reach the above goals. These efforts shall commence immediately after final designation and shall continue through both initial rent-up and for a sufficient period of time after initial rent-up to insure that integration is maintained. The final marketing plan shall specify those efforts to be undertaken by the developer and shall identify the applicable time periods.

Preliminary and final marketing plans shall include means of assuring potential residents that the redeveloped Columbia Point will be established and maintained as an integrated community. The final marketing plan shall also include provision for review and specific enforcement of racial integration goals by the BHA, BRA, and other appropriate public agencies.

B. Construction Hiring

The following standard affirmative action requirements of BHA and BRA in construction hiring and contracting should be met:

Construction Workers - Of the total person hours in each construction trade for a specified time period, it is BHA policy that there shall be 30% minority employee person hours. In addition, for City of Boston and BRA funded work, best efforts shall be used to attain at least 50% bona fide Boston resident person hours and 10% women person hours.

Contracting - It is BHA policy for an impacted area such as Columbia Point that 30% of final construction agreement price shall be expended for work performed or goods or services supplied by minority business enterprises (with two-thirds of this requirement to be satisfied by use of minority-owned construction contractors, as opposed to suppliers).

In addition to these standard requirements, the developer in cooperation with its contractors and appropriate unions shall develop opportunities for training and hiring of public housing residents with first preference to Columbia Point residents. The purpose shall be to aid in meeting minority affirmative action requirements and to meet the requirements of Section 3 of the Housing and Urban Development Action of 1968.

Two areas have been identified by the Three Parties: (1) the hiring of laborers and (2) the training for the different construction trades used at the Columbia Point construction site. After study of the construction size and phasing, developer applicants shall set forth realistic goals and timetables (and an explanation of how they were developed) for the hiring of public housing residents in both these categories over the term of the construction.

The BHA is currently developing, as part of redevelopment at Commonwealth, West Broadway and Franklin Field, programs for up to 16 apprenticeship positions and 10 labor positions in each development. The Columbia Point development presents much greater opportunity for training and laborer positions, because of the larger size of the proposed construction.

The developer applicant shall investigate this area and propose as a part of its initial submission a construction training program, sufficient to qualify for approval by the Massachusetts Bureau of Apprenticeship Training, to train and employ a specific number of public housing residents as apprentices in the construction trades. The training program must be finalized as a condition of final designation. As part of this requirement, the training program shall provide, to the maximum extent feasible, for employment of the apprentice participants on the Columbia Point construction site, other BHA public housing construction sites, and other construction sites under the control of the private developer who has been selected for Columbia Point. The training program shall also ensure that apprentices will be employed for sufficient time to complete the full apprenticeship requirements and receive journeyman status in their respective trades.

APPENDIX C

FD-15 (FORM NO. 2-17)

U. S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
FEDERAL HOUSING ADMINISTRATION

Form Approved
Budget Bureau No. 63-00027

PERSONAL FINANCIAL AND CREDIT STATEMENT

Project Name _____ Number _____

Location _____

Statement of _____ As of _____ 19 _____

Address _____

ASSETS		LIABILITIES AND NET WORTH	
Cash on hand in banks (Name of depository)	(Balance)	Accounts payable	\$
\$		Notes payable	
		Debt payable in less than one year (secured by mort- gages on land and buildings)	
	\$	Debt payable in less than one year (secured by chattel mortgages or other liens on assets)	
Accounts receivable		Other current liabilities: (describe)	\$
Less: Doubtful Accounts			
Notes receivable		Total Current Liabilities	\$
Less: Doubtful Notes		Debt payable in more than one year (secured by mort- gages on land and buildings)	
Stocks and Bonds - Market Value (Schedule A-reverse side)		Debt payable in more than one year (secured by chattel mortgages or other liens on assets)	
Other current assets (describe)		Other liabilities (describe)	\$
\$			
		TOTAL LIABILITIES	\$
Total Current Assets	\$	Net Worth	
Real Property - at net* (Schedule B-reverse side)		TOTAL LIABILITIES AND NET WORTH	\$
Machinery Equipment and Fixtures - at net			
Life Insurance (Cash value less loans)	\$		
Other assets (describe):			
\$			
TOTAL ASSETS	\$		

* Cost, including improvements, less depreciation.

Accounts and Notes Receivable:

Amounts, if any, due from partners (P), employees (E)
or relatives (R), specify:

Type (P, E or R)	Name	Address	Amount
			\$

Insurance:

Life (face value) \$ _____
Beneficiary _____

Pledged Assets:

Type Pledged	Amount	Offsetting Liability

Delinquencies:

If any taxes, mortgage payments or other liabilities are
past due, specify:

Type Liability	Amount	Circumstances

Notes Payable:

Payable to	Amount	Maturity Date

Legal Proceedings:

If any legal proceedings have been instituted by creditors,
or any unsatisfied judgments remain on record, give full de-
tails:

NOTE: If more space is required use separate sheet of paper writing to one side only.

(Over)

Architect-Engineer and Related Services 254 Questionnaire

Standard Form 254
General Services Administration,
Washington, D. C. 20405
Fed. Proc. Reg. (41 CFR) 1-16. 803
Armed Svc. Proc. Reg. 18-403

Purpose:

The policy of the Federal Government, in procuring architectural, engineering, and related professional services, is to encourage firms lawfully engaged in the practice of those professions to submit annually a statement of qualifications and performance data. Standard Form 254, "Architect-Engineer and Related Services Questionnaire" is provided for that purpose. Interested A-E firms (including new, small, and/or minority firms) should complete and file SF 254's with each Federal agency and with appropriate regional or district offices for which the A-E is qualified to perform services. The agency head for each proposed project shall evaluate these qualification resumes, together with any other performance data on file or requested by the agency, in relation to the proposed project. The SF 254 may be used as a basis for selecting firms for discussions, or for screening firms preliminary to inviting submission of additional information.

Definitions:

"Architect-engineer and related services" are those professional services associated with research, development, design and construction, alteration, or repair of real property, as well as incidental services that members of these professions and those in their employ may logically or justifiably perform, including studies, investigations, surveys, evaluations, consultations, planning, programming, conceptual designs, plans and specifications, cost estimates, inspections, shop drawing reviews, sample recommendations, preparation of operating and maintenance manuals, and other related services.

"Parent Company" is that firm, company, corporation, association or conglomerate which is the major stockholder or highest tier owner of the firm completing this questionnaire; i.e. Firm A is owned by Firm B which is, in turn, a subsidiary of Corporation C. The "parent company" of Firm A is Corporation C.

"Principals" are those individuals in a firm who possess legal responsibility for its management. They may be owners, partners, corporate officers, associates, administrators, etc.

"Discipline", as used in this questionnaire, refers to the primary technological capability of individuals in the responding firm. Possession of an academic degree, professional registration, certification, or extensive experience in a particular field of practice normally reflects an individual's primary technical discipline.

"Joint Venture" is a collaborative undertaking by two or more firms or individuals for which the participants are both jointly and individually responsible.

"Consultant", as used in this questionnaire, is a highly specialized individual or firm having significant input and responsibility for certain aspects of a project and possessing unusual or unique capabilities for assuring success of the finished work.

"Prime" refers to that firm which may be coordinating the concerted and

complementary inputs of several firms, individuals or related services to produce a completed study or facility. The "prime" would normally be regarded as having full responsibility and liability for quality of performance by itself as well as by subcontractor professionals under its jurisdiction.

"Branch Office" is a satellite, or subsidiary extension, of a headquarters office of a company, regardless of any differences in name or legal structure of such a branch due to local or state laws. "Branch offices" are normally subject to the management decisions, bookkeeping, and policies of the main office.

Instructions for Filing (Numbers below correspond to numbers contained in form):

1. Type accurate and complete name of submitting firm, its address, and zip code.
 - 1a. Indicate whether form is being submitted in behalf of a parent firm or a branch office. (Branch office submissions should list only personnel in, and experience of, that office.)
2. Provide date upon which all submitted information is current and accurate.
3. Show date the firm was established under the name shown in question 1.
4. Enter type of ownership, or legal structure, of firm (sole proprietor, partnership, corporation, joint venture, etc.)
 - 4a. Check appropriate box indicating if firm is minority-owned. (See 41 CFR 1-1.1.3 or ASPR 1-332.3(a) for definitions of minority ownership.)
5. Branches or subsidiaries of larger or parent companies, or conglomerates, should insert name and address of highest-tier owner.
 - 5a. If present firm is the successor to, or outgrowth of, one or more predecessor firms, show name(s) of former entity(ies) and the year(s) of their original establishment.
6. List not more than two principals from submitting firm who may be contacted by the agency receiving this form. (Different principals may be listed on forms going to another agency.) Listed principals must be empowered to speak for the firm on policy and contractual matters.
7. Beginning with the submitting office, list name, location, total number of personnel and telephone numbers for all associated or branch offices, (including any headquarters or foreign offices) which provide A-E and related services.
 - 7a. Show total personnel in all offices. (Should be sum of all personnel, all branches.)
8. Show total number of employees, by discipline, in submitting office. (If form is being submitted by main or headquarters office, firm should list total employees, by discipline, in all offices.) While some personnel may be qualified in several disciplines, each person should be counted only once in accord with his or her primary function. Include clerical personnel as "administrative."

Architect-Engineer and Related Services 254 Questionnaire

Standard Form 254
General Services Administration,
Washington, D. C. 20405
Fed. Proc. Reg. (41 CFR) 1-16.803
Armed Svc. Proc. Reg. 18-403

Write in any additional disciplines—sociologists, biologists, etc.—and number of people in each, in blank spaces.

9. Using chart (below) insert appropriate index number to indicate range of professional services fees approved by submitting firm each calendar year for last five years, most recent year first. Fee summaries should be broken down to reflect the fees received each year for (a) work performed directly for the Federal Government (not including grant and loan projects) or as a sub to other professionals performing work directly for the Federal Government; (b) all other domestic work, U.S. and possessions, including Federally-assisted projects, and (c) all other foreign work.

Ranges of Professional Services Fees

INDEX	
1.	Less than \$100,000
2.	\$100,000 to \$250,000
3.	\$250,000 to \$500,000
4.	\$500,000 to \$1 million
5.	\$1 million to \$2 million
6.	\$2 million to \$5 million
7.	\$5 million to \$10 million
8.	\$10 million or greater

10. Select and enter, in numerical sequence, **not more than thirty (30)** "Experience Profile Code" numbers from the listing (next page) which most accurately reflect submitting firm's demonstrated technical capabilities and project experience. **Carefully review list.** (It is recognized some profile codes may be part of other services or projects contained on list; firms are encouraged to select profile codes which best indicate type and scope of services provided on past projects.) For each code number, show total number of projects and gross fees (in thousands) received for profile projects performed by firm during past five years. If firm has one or more capabilities not included on list, insert same in blank spaces at end of list and show numbers in question 10 on the form. In such cases, the filled-in listing **must** accompany the complete SF 254 when submitted to the Federal agencies.

11. Using the "Experience Profile Code" numbers in the same sequence as entered in item 10, give details of at least one recent (within last five years) representative project for each code number, up to a **maximum** of thirty (30) separate projects, or portions of projects, for which firm was responsible. (Project examples may be used more than once to illustrate different services rendered on the same job. Example: a dining hall may be part of an auditorium or educational facility.) Firms which select less than thirty "profile codes" may list two or more project examples (to illustrate specialization) for each code number so long as total of all project examples does not exceed thirty (30). After each code number in question 11, show: (a) whether firm was "P," the prime professional, or "C," a consultant, or "JV," part of a joint venture on that particular project (New firms, in existence less than five (5) years may use the symbol "IE" to indicate "Individual Experience" as opposed to firm experience); (b) provide name and location of the specific project which typifies firm's (or individual's) performance under that code category; (c) give name and address of the owner of that project (if government agency indicate responsible office); (d) show the estimated construction cost (or other applicable

cost) for that portion of the project for which the firm was primarily responsible. (Where no construction was involved, show approximate cost of firm's work); and (e) state year work on that particular project was, or will be, completed.

12. The completed SF 254 should be signed by a principal of the firm, preferably the chief executive officer.

13. Additional data, brochures, photos, etc. should not accompany this form unless specifically requested.

NEW FIRMS (not reorganized or recently-amalgamated firms) are eligible and encouraged to seek work from the Federal Government in connection with performance of projects for which they are qualified. Such firms are encouraged to complete and submit Standard Form 254 to appropriate agencies. Questions on the form dealing with personnel or experience may be answered by citing experience and capabilities of individuals in the firm, based on performance and responsibility while in the employ of others. In so doing, notation of this fact should be made on the form. In question 9, write in "N/A" to indicate "not applicable" for those years prior to firm's organization.

Experience Profile Code Numbers for use with questions 10 and 11

001 Acoustics; Noise Abatement	041 Graphic Design	083 Power Generation, Transmission, Distribution
002 Aerial Photogrammetry	042 Harbors; Jetties; Piers; Ship Terminal Facilities	084 Prisons & Correctional Facilities
003 Agricultural Development; Grain Storage; Farm Mechanization	043 Heating; Ventilating; Air Conditioning	085 Product, Machine & Equipment Design
004 Air Pollution Control	044 Health Systems Planning	086 Radar; Sonar; Radio & Radar Telescopes
005 Airports; Navoids; Airport Lighting; Aircraft Fueling	045 Highrise; Air-Rights-Type Buildings	087 Railroad; Rapid Transit
006 Airports; Terminals & Hangars; Freight Handling	046 Highways; Streets; Airfield Paving; Parking Lots	088 Recreation Facilities (Parks, Marinas, Etc.)
007 Arctic Facilities	047 Historical Preservation	089 Rehabilitation (Buildings; Structures; Facilities)
008 Auditoriums & Theatres	048 Hospitals & Medical Facilities	090 Resource Recovery; Recycling
009 Automation; Controls; Instrumentation	049 Hotels; Motels	091 Radio Frequency Systems & Shieldings
010 Barracks; Dormitories	050 Housing (Residential, Multi-Family; Apartments; Condominiums)	092 Rivers; Canals; Waterways; Flood Control
011 Bridges	051 Hydraulics & Pneumatics	093 Safety Engineering; Accident Studies; OSHA Studies
012 Cemeteries (Planning & Relocation)	052 Industrial Buildings; Manufacturing Plants	094 Security Systems; Intruder & Smoke Detection
013 Chemical Processing & Storage	053 Industrial Processes; Quality Control	095 Seismic Designs & Studies
014 Churches; Chapels	054 Industrial Waste Treatment	096 Sewage Collection, Treatment and Disposal
015 Codes; Standards; Ordinances	055 Interior Design; Space Planning	097 Soils & Geologic Studies; Foundations
016 Cold Storage; Refrigeration; Fast Freeze	056 Irrigation; Drainage	098 Solar Energy Utilization
017 Commercial Buildings (low rise); Shopping Centers	057 Judicial and Courtroom Facilities	099 Solid Wastes; Incineration; Land Fill
018 Communications Systems; TV; Microwave	058 Laboratories; Medical Research Facilities	100 Special Environments; Clean Rooms, Etc.
019 Computer Facilities; Computer Service	059 Landscape Architecture	101 Structural Design; Special Structures
020 Conservation and Resource Management	060 Libraries; Museums; Galleries	102 Surveying; Platting; Mapping; Flood Plain Studies
021 Construction Management	061 Lighting (Interiors; Display; Theatre, Etc.)	103 Swimming Pools
022 Corrosion Control; Cathodic Protection; Electrolysis	062 Lighting (Exteriors; Streets; Memorials; Athletic Fields, Etc.)	104 Storm Water Handling & Facilities
023 Cost Estimating	063 Materials Handling Systems; Conveyors; Sorters	105 Telephone Systems (Rural; Mobile; Intercom, Etc.)
024 Dams (Concrete, Arch)	064 Metallurgy	106 Testing & Inspection Services
025 Dams (Earth; Rock); Dikes; Levees	065 Microclimatology; Tropical Engineering	107 Traffic & Transportation Engineering
026 Desalination (Process & Facilities)	066 Military Design Standards	108 Towers (Self-Supporting & Guyed Systems)
027 Dining Halls; Clubs; Restaurants	067 Mining & Mineralogy	109 Tunnels & Subways
028 Ecological & Archeological Investigations	068 Missile Facilities (Silos; Fuels; Transport)	110 Urban Renewal; Community Development
029 Educational Facilities; Classrooms	069 Modular Systems Design; Prefabricated Structures or Components	111 Utilities (Gas & Steam)
030 Electronics	070 Naval Architecture; Off-Shore Platforms	112 Value Analysis; Life-Cycle Costing
031 Elevators; Escalators; People-Movers	071 Nuclear Facilities; Nuclear Shielding	113 Warehouses & Depots
032 Energy Conservation; New Energy Sources	072 Office Buildings; Industrial Parks	114 Water Resources; Hydrology; Ground Water
033 Environmental Impact Studies, Assessments or Statements	073 Oceanographic Engineering	115 Water Supply, Treatment and Distribution
034 Fallout Shelters; Blast-Resistant Design	074 Ordnance; Munitions; Special Weapons	116 Wind Tunnels; Research/Testing Facilities Design
035 Field Houses; Gyms; Stadiums	075 Petroleum Exploration; Refining	117 Zoning; Land Use Studies
036 Fire Protection	076 Petroleum and Fuel (Storage and Distribution)	201
037 Fisheries; Fish Ladders	077 Pipelines (Cross-Country - Liquid & Gas)	202
038 Forestry & Forest Products	078 Planning (Community, Regional, Areawide and State)	203
039 Garages; Vehicle Maintenance Facilities; Parking Decks	079 Planning (Site, Installation, and Project)	204
040 Gas Systems (Propane, Natural, Etc.)	080 Plumbing & Piping Design	205
	081 Pneumatic Structures; Air-Support Buildings	
	082 Postal Facilities	

1. Firm Name / Business Address:

1a. Submittal is for ☐ Parent Company ☐ Branch Office

2. Year Firm
Established:

4. Type of Ownership:

4a. Minority Owned ☐ yes ☐ no

3. Date Prepared:

5. Name of Parent Company, if any:

5a. Former Firm Name(s), if any, and Year(s) Established:

6. Names of not more than Two Principals to Contact: Title / Telephone

1)
2)

7. Present Offices: City / State / Telephone / No. Personnel Each Office

7a. Total Personnel _____

8. Personnel by Discipline:

___ Administrative
___ Architects
___ Chemical Engineers
___ Civil Engineers
___ Construction Inspectors
___ Draftsmen
___ Ecologists
___ Economists

___ Electrical Engineers
___ Estimators
___ Geologists
___ Hydrologists
___ Interior Designers
___ Landscape Architects
___ Mechanical Engineers
___ Mining Engineers

___ Oceanographers
___ Planners: Urban/Regional
___ Sanitary Engineers
___ Soils Engineers
___ Specification Writers
___ Structural Engineers
___ Surveyors
___ Transportation Engineers

9. Summary of Professional Services Fees

Received: (insert index number)

Last 5 Years (most recent year first)

19 _____ 19 _____ 19 _____

Direct Federal contract work, including overseas

All other domestic work

All other foreign work*

*Firms interested in foreign work, but without such experience, check here: ☐.

Ranges of Professional Services Fees

Index

1. Less than \$100,000
2. \$100,000 to \$250,000
3. \$250,000 to \$500,000
4. \$500,000 to \$1 million
5. \$1 million to \$2 million
6. \$2 million to \$5 million
7. \$5 million to \$10 million
8. \$10 million or greater

10. Profile of 10 Years Project Experience, Last 5 Years

Profile Code	Number of Projects	Total Gross Fees (in thousands)	Profile Code	Number of Projects	Total Gross Fees (in thousands)	Profile Code	Number of Projects	Total Gross Fees (in thousands)	Profile Code	Number of Projects	Total Gross Fees (in thousands)
1)			11)			21)			21)		
2)			12)			22)			22)		
3)			13)			23)			23)		
4)			14)			24)			24)		
5)			15)			25)			25)		
6)			16)			26)			26)		
7)			17)			27)			27)		
8)			18)			28)			28)		
9)			19)			29)			29)		
10)			20)			30)			30)		

11. Project Examples, Last 5 Years

Profile "IP", "C", "JV", or "E"	Project Name and Location	Owner Name and Address	Cost of Work (in thousands)	Completion Date (Actual or Estimated)
	1			
	2			
	3			
	4			
	5			
	6			
	7			

Architect-Engineer and Related Services Questionnaire for Specific Project

255

Standard Form 255
General Services Administration,
Washington, D. C. 20405
Fed. Proc. Reg. (41 CFR) 1-16 . 803
Armed Svc. Proc. Reg. 18-403

Purpose:

This form is a supplement to the "Architect-Engineer and Related Services Questionnaire" (SF 254). Its purpose is to provide additional information regarding the qualifications of interested firms to undertake a specific Federal A-E project. Firms, or branch offices of firms, submitting this form should enclose (or already have on file with the appropriate office of the agency) a curriculum (within the past year) and accurate copy of the SF 254 for that office.

The procurement official responsible for each proposed project may request submission of the SF 255 "Architect-Engineer and Related Services Questionnaire for Specific Project" in accordance with applicable civilian and military procurement regulations and shall evaluate such submissions, as well as related information contained on the Standard Form 254, and any other performance data on file with the agency, and shall select firms for subsequent discussions leading to contract award in conformance with Public Law 92-582. This form should only be filed by an architect-engineer or related services firm when requested to do so by the agency or by a public announcement. Responses should be as complete and accurate as possible, contain data relative to the specific project for which you wish to be considered, and should be provided, by the required due date, to the office specified in the request or public announcement.

This form will be used only for the specified project. Do not refer to this submission in response to other requests or public announcements.

Definitions:

"**Architect-engineer and related services**" are those professional services associated with research, development, design and construction, alteration, or repair of real property, as well as incidental services that members of these professions and those in their employ may logically or justifiably perform, including studies, investigations, surveys, evaluations, consultations, planning, programming, conceptual designs, plans and specifications, cost estimates, inspections, shop drawing reviews, sample recommendations, preparation of operating and maintenance manuals, and other related services.

"**Principals**" are those individuals in a firm who possess legal responsibility for its management. They may be owners, partners, corporate officers, associates, administrators, etc.

"**Discipline**", as used in this questionnaire, refers to the primary technological capability of individuals in the responding firm. Possession of an academic degree, professional registration, certification, or extensive experience in a particular field of practice normally reflects an individual's primary technical discipline.

"**Joint Venture**", is a collaborative undertaking of two or more firms or individuals for which the participants are both jointly and individually responsible.

"**Key Persons, Specialists, and Individual Consultants**", as used in this questionnaire, refer to individuals who will have major project responsibility or will provide unusual or unique capabilities for the project under consideration.

Instructions for Filing (Numbers below correspond to numbers contained in form):

1. Give name and location of the project for which this form is being submitted.
2. Provide appropriate data from the Commerce Business Daily (CBD) identifying the particular project for which this form is being filed.
- 2a. Give the date of the Commerce Business Daily in which the project announcement appeared, or indicate "not applicable" (N/A) if the source of the announcement is other than the CBD.
- 2b. Indicate Agency identification or contract number as provided in the CBD announcement.
3. Show name of the individual or firm (or joint venture) which is submitting this form for the project.
- 3a. List the name, title, and telephone number of that principal who will serve as the point of contact. Such an individual must be empowered to speak for the firm on policy and contractual matters and should be familiar with the programs and procedures of the agency to which this form is directed.
- 3b. Give the address of the specific office which will have responsibility for performing the announced work.
4. Insert the number of personnel by discipline presently employed (on date of this form) at work location. While some personnel may be qualified in several disciplines, each person should be counted only once in accordance with his or her primary function. Include clerical personnel as "administrative." Write in any additional disciplines - sociologists, biologists, etc. - and number of people in each, in blank spaces.
5. Answer only if this form is being submitted by a joint venture of two or more collaborating firms. Show the names and addresses of all individuals or organizations expected to be included as part of the joint venture and describe their particular areas of anticipated responsibility (i.e., technical disciplines, administration, financial, sociological, environmental, etc.)
- 5a. Indicate, by checking the appropriate box, whether this particular joint venture has successfully worked together on other projects.

Each firm participating in the joint venture should have a Standard Form 254 on file with the contracting office receiving this form. Firms which do not have such forms on file should provide same immediately along with a notation

Architect-Engineer
and Related Services
Questionnaire for
Specific Project

255

Standard Form 255
General Services Administration,
Washington, D. C. 20405
Fed. Proc. Reg. (41 CFR) 1-16 . 803
Armed Svc. Proc. Reg. 18-403

regarding their association with this joint venture submission.

6. If respondent is not a joint venture, but intends to use outside (as opposed to in-house or permanently and formally affiliated) consultants or associates, he should provide names and addresses of all such individuals or firms, as well as their particular areas of technical/professional expertise, as it relates to this project. Existence of previous working relationships should be noted. If more than eight outside consultants or associates are anticipated, attach an additional sheet containing requested information.

7. Regardless of whether respondent is a joint venture or an independent firm, provide brief resumes of key personnel expected to participate on this project. Care should be taken to limit resumes to only those personnel and specialists who will have major project responsibilities. Each resume must include: (a) name of each key person and his or her title, (b) the project assignment or role which that person will be expected to fulfill in connection with this project, (c) the name of the firm or organization, if any, with whom that individual is presently associated, (d) years of relevant experience with present firm and other firms, (e) the highest academic degree achieved and the discipline covered (if more than one highest degree, such as two Ph.D.'s, list both), the year received and the particular technical/professional discipline which that individual will bring to the project, (f) if registered as an architect, engineer, surveyor, etc., show only the field of registration and the year that such registration was first acquired. If registered in several states, do not list states, and (g) a synopsis of experience, training, or other qualities which reflect individual's potential contribution to this project. Include such data as: familiarity with Government or agency procedures, similar type of work performed in the past, management abilities, familiarity with the geographic area, relevant foreign language capabilities, etc. Please limit synopsis of experience to directly relevant information.

8. List up to ten projects which demonstrate the firm's or joint venture's competence to perform work similar to that likely to be required on this project. The more recent such projects, the better. Prime consideration will be given to projects which illustrate respondent's capability for performing work similar to that being sought. Required information must include: (a) name and location of project, (b) brief description of type and extent of services provided for each project (submissions by joint ventures should indicate which member of the joint venture was the prime on that particular project and what role it played), (c) name and address of the owner of that project (if Government agency, indicate responsible office), (d) completion date (actual or estimated), (e) total construction cost of completed project, (or where no construction was involved, the approximate cost of your work) and that portion of the cost of the project for which the named firm was/is responsible.

9. List only those projects which the A-E firm or joint venture, or members of the joint venture, are currently performing under direct contract with an agency or department of the Federal Government. Exclude any grant or loan projects being financed by the Federal Government but being performed under contract to other non-Federal governmental entities. Information provided under each heading is similar to that requested in the preceding item 8, except for (d) "Percent Complete." Indicate in this item the percentage of A-E work completed upon filing this form.

10. Through narrative discussion, show reason why the firm or joint venture submitting this questionnaire believes it is especially qualified to undertake the project. Information provided should include, but not be limited to, such data as: specialized equipment available for this work, any awards or recognition received by a firm or individuals for similar work, required security clearances, special approaches or concepts developed by the firm relevant to this project, etc. Respondents may say anything they wish in support of their qualifications. When appropriate, respondents may supplement this proposal with graphic material and photographs which best demonstrate design capabilities of the team proposed for this project.

11. Completed forms should be signed by the chief executive officer of the joint venture (thereby attesting to the concurrence and commitment of all members of the joint venture), or by the architect-engineer principal responsible for the conduct of the work. In the event it is awarded to the organization submitting this form, joint ventures selected for subsequent discussions regarding this project must make available a statement of participation signed by a principal of each member of the joint venture. **ALL INFORMATION CONTAINED IN THE FORM SHOULD BE CURRENT AND FACTUAL.**

1. Project Name / Location for which Firm is Filing:

2a. Commerce Business
Daily Announcement
Date, if any:2b. Agency Identification
Number, if any:

3. Firm (or Joint-Venture) Name & Address

3a. Name, Title & Telephone Number of Principal to Contact

3b. Address of office to perform work, if different from Item 3

4. Personnel by Discipline:

☐ Administrative
☐ Architects
☐ Chemical Engineers
☐ Civil Engineers
☐ Construction Inspectors
☐ Draftsmen
☐ Ecologists
☐ Economists
☐ Electrical Engineers
☐ Estimators
☐ Geologists
☐ Hydrologists
☐ Interior Designers
☐ Landscape Architects
☐ Mechanical Engineers
☐ Mining Engineers

☐ Oceanographers
☐ Planners: Urban/Regional
☐ Sanitary Engineers
☐ Soils Engineers
☐ Specification Writers
☐ Structural Engineers
☐ Surveyors
☐ Transportation Engineers
☐ Total Personnel

5. If submittal is by Joint-Venture list participating firms and outline specific areas of responsibility (including administrative, technical and financial) for each firm:
(Attach SF 254 for each if not on file with Procuring Office.)

5a. Has this Joint-Venture previously worked together? ☐ yes ☐ no

6. Outside Key Consultants/Associates Anticipated for this Project (Attach SF 254 for Consultants/Associates Listed, if not already of file with the Procuring Office)		
Name & Address	Specialty	Worked with Prime before (Yes or No)
1)		
2)		
3)		
4)		
5)		
6)		
7)		
8)		

7. Brief Res of Key Persons, Specialists, and Individual Consultants Anticipated in this Project

a. Name & Title:	a. Name & Title:
b. Project Assignment:	b. Project Assignment:
c. Name of Firm with which associated:	c. Name of Firm with which associated:
d. Years experience: With This Firm _____ With Other Firms _____	d. Years experience: With This Firm _____ With Other Firms _____
e. Education: Degree(s) / Year / Specialization	e. Education: Degree(s) / Years / Specialization
f. Active Registration: Year First Registered/Discipline	f. Active Registration: Year First Registered/Discipline
g. Other Experience and Qualifications relevant to the proposed project:	g. Other Experience and Qualifications relevant to the proposed project:

7. Brief Resume of Key Persons, Specialists, and Individual Consultants Anticipated for this Project			
a. Name & Title:			
b. Project Assignment:			
c. Name of Firm with which associated:			
d. Years experience: With This Firm ____ With Other Firms ____			
e. Education: Degree(s) / Years / Specialization			
f. Active Registration: Year First Registered/Discipline			
g. Other Experience and Qualifications relevant to the proposed project:			

7. Brief Res of Key Persons, Specialists, and Individual Consultants Anticipated in this Project	a. Name & Title:	a. Name & Title:
	b. Project Assignment:	b. Project Assignment:
	c. Name of Firm with which associated:	c. Name of Firm with which associated:
	d. Years experience: With This Firm With Other Firms	d. Years experience: With This Firm With Other Firms
	e. Education: Degree(s) / Year / Specialization	e. Education: Degree(s) / Years / Specialization
	f. Active Registration: Year First Registered/Discipline	f. Active Registration: Year First Registered/Discipline
	g. Other Experience and Qualifications relevant to the proposed project:	g. Other Experience and Qualifications relevant to the proposed project:

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a. Name & Title:	a. Name & Title:
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c. Name of Firm with which associated:	c. Name of Firm with which associated:
d. Years experience: With This Firm _____ With Other Firms _____	d. Years experience: With This Firm _____ With Other Firms _____
e. Education: Degree(s) / Year / Specialization	e. Education: Degree(s) / Years / Specialization
f. Active Registration: Year First Registered/Discipline	f. Active Registration: Year First Registered/Discipline
g. Other Experience and Qualifications relevant to the proposed project:	g. Other Experience and Qualifications relevant to the proposed project:

8. Work by or Joint Venture Members which Best Illustrates Current Qualifications Relevant to this Project (List not more than 10 Projects)					a. Estimated Cost (in thousands)	
a. Project Name & Location	b. Nature of Firm's Responsibility	c. Owner's Name & Address	d. Completion Date (actual or estimated)	Work for which Firm was/is responsible	Entire Project	
(1)						
(2)						
(3)						
(4)						
(5)						
(6)						
(7)						
(8)						
(9)						
(10)						

9. All work by firms or Joint Venture members currently being performed directly for Federal agencies

a. Project Name & Location	b. Nature of Firm's Responsibility	c. Agency (Responsible Office) Name & Address	d. Percent complete	e. Estimated Cost (In Thousands)	
				Entire Project	Work for which firm is responsible

orting your firm's qualifications for the proposed project

escription of resources

e to provide any additional information c.

10. Use this

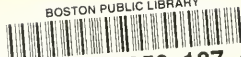
Date:

11. The foregoing is a statement of facts.

Typed Name and Title:

Signature:

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